Ariel
User Manual
v 4.1

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Chapter 1. Introduction

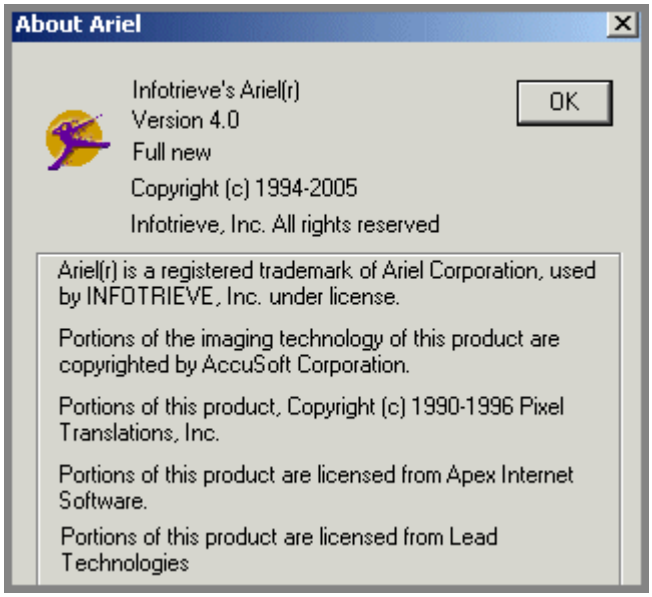
Introduction provides a brief overview of Ariel and the publication library developed for it.

This chapter provides a brief overview of the application, various features of Ariel, benefits of using Ariel, and the user documentation such as the User Manual and the Help System developed for it. It also provides information about the content organization and the notational conventions used. It consists of the following sections:

- About Ariel
- About Ariel Publication Library
- About Ariel User Manual

About Ariel

Welcome to Ariel v4.1, a client/server application developed to facilitate transfer of documents between libraries that are located in different geographical locations.


About Ariel
Infotrieve's Ariel(r)
Version 4.0
Full new
Copyright (c) 1994-2005
Infotrieve, Inc. All rights reserved
OK
Ariel(r) is a registered trademark of Ariel Corporation, used by INFOTRIEVE, Inc. under license.
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Using Ariel, you can scan and send documents to various Ariel workstations or patrons. Documents can also be received from other Ariel workstations and saved. Ariel workstations are those systems that have Ariel installed on them. Patrons are external clients who do not have Ariel installed on their systems, but can receive documents from other Ariel workstations. This section discusses the various features of Ariel and the benefits of using it and consists of the following:

- Ariel Features

Ariel Features

Ariel can be used to scan, maintain, and exchange documents within Ariel workstations. When patrons request for documents, they can be sent to them through email or FTP from Ariel workstations. Documents can be received and saved in the respective windows of the application.

Ariel consists of the following Queue windows using which you can send, receive, and save documents.

- Send Queue window - Lists documents that are being sent to other Ariel workstations.
- Delivery Queue window - Lists documents that are being sent to patrons.

- Received Queue window - Lists documents received from other Ariel workstations.

- Archive Queue window - Lists documents that are saved in Ariel. Documents can be saved after scanning or importing them into Ariel. You can also save documents from the Send, Delivery, and Received Queue windows.

Based on the activities you perform, the application consists of the following features:

- **Document** - Using this feature, you can scan, view, and send documents to Ariel workstations or patrons and print documents received from other Ariel workstations. You can save or delete scanned documents which are saved in the respective queue windows. Bibliographic and transaction information of a document can also be maintained. You can cancel the delivery of documents to patrons and also remove posted documents from the Delivery Queue window. You can import images to the Archive Queue window or send them to patrons or other Ariel workstations.

- **Settings** - Using this feature, you can set up the default options for scanning, sending, receiving, delivering, and printing documents. In addition, you can set the firewall, store forward and store retrieve, FTP, in coming mail settings, and other general options.

- **Address book -** Using this feature, you can maintain address details of Ariel workstations using alias names. You can also import the address details from Excel or Comma Separated Value (CSV) files to Ariel. You can add a new address, modify, or delete the existing address details.

- **Patrons list -** Using this feature, you can create and maintain email addresses of patrons for sending documents to them. You can also import the patron from Excel or Comma Separated Value (CSV) files to Ariel. You can add a new patron address, modify, or delete the existing patron address. In addition, you can link Ariel to an external ILL patron database to import the addresses of patrons and send documents to patrons.

- **Log -** Using this feature, you can view the log entries of documents sent or received in Ariel. You can also set up the log options for deleting log entries after a specific time duration.

- **View** - Using this feature, you can view the toolbar, status bar, and the transfer status of documents that are sent to Ariel workstations or patrons or received from other Ariel workstations.

- **Tools -** Using this feature, you can view the document counter details and reset the document count in the Send, Received, Delivery, and Archive Queue windows. You can set the password for viewing the document count details. In addition, you can change the password for accessing the document count details. The count of documents will be the total number of documents in a specific Queue window since the last reset of the document count.

- **Window -** Using this feature, you can change the arrangement of the Queue windows to cascade or tile and arrange the icons in Ariel.

Benefits of Ariel

The benefits of Ariel are:

- Ariel is a flexible application which is compatible with the PC platform. It works with a wide range of printers and scanners. Using standard hardware, a dial-up connection, and email, it can be effectively used by all types of institutions.

- The various set up options required for executing the document management tasks can be performed easily. You can modify the set up options to meet your requirements.

- Scanning images in Ariel provides higher resolution and superior graphic image quality thus making difficult scripts and minutely detailed images stand out, especially the Asian scripts, mathematical equations, and images from Elizabethan woodcuts to NASA photos. The document quality remains intact while forwarding the documents.

- Ariel can be effectively used for sending or receiving large documents to Ariel workstations or patrons. Documents can be exchanged between institutions. In addition, Ariel can be used for performing various document management tasks such as modifying, printing, canceling, removing, and deleting documents.

- The preview option in Ariel enables you to preview documents as you scan them. This enables the sender to check for any

missing pages. The missing pages can then be scanned and inserted or deleted.

- When the documents are sent from Ariel workstations, Ariel compresses the data to make transmission faster. Documents can be sent or received simultaneously at your convenience.
- Ariel can be effectively used for managing the address details of Ariel workstations and patrons. The log entries of documents sent or received can be tracked and monitored.
- With its wide range of activities and features, Ariel outperforms the fax in speed, quality, reliability, and cost.

About Ariel Publication Library

The Ariel publication library has been developed as a comprehensive reference for performing various document management tasks. It provides all the necessary information to the users for effective usage of the application. The publication library for the application includes:

- User Manual - This is intended for the end users of the application. It provides conceptual and task-based procedural information with screen captures required for optimal usage of the application.
- Help System - This is intended as an online reference for all types of users of the application. It provides context sensitive help to the users with conceptual, and task-based procedural and setup information for performing the required tasks.

About Ariel User Manual

The Ariel User Manual is an extensive reference source for the end users of the application in the portable document format (.pdf). It provides both conceptual and task-based procedural information. Relevant screen captures of the application are also provided for better understanding of the tasks. Examples are also used to explain task concepts in an easy manner.

This section provides information on the organization of the User Manual and the various conventions that are used. It consists of the following sections:

- Organization of Chapters
- Notational Conventions

Organization of Chapters

The Ariel User Manual is organized into chapters in a sequential manner based on the activities performed in the application.

The first chapter, "**Introduction**" provides information about Ariel and the benefits of using the application. It briefly describes the user documentation and its contents, the purpose of developing the User Manual, organization of chapters, and the notational conventions used in the User Manual.

The second chapter, "**Getting Started**" provides information on how to access Ariel and navigate within it.

The third chapter, "**Setting Up Ariel**" provides information on setting up various preferences and maintaining address details of the various Ariel workstations and patrons, required for working with the application.

The fourth chapter, "**Document Management**" provides information about various document management tasks that can be performed using the Queue windows of the application.

Notational Conventions

The various notational conventions used in the User Manual are explained as follows:

Menu and submenu items, hyperlinks, checkboxes, and command buttons are marked in bold in procedures and tasks. In addition, application buttons are marked in bold when stated in notes, tips, and warnings. For example,

- Click **Apply** to save the options.
- Click **OK** to save and close the window.

You can navigate within Ariel using the menus and submenus. The notational convention used for menu navigation is:

- Select **Settings → Preferences → Patron Delivery**.

Notes, Tips, and Warnings

Notes, tips, and warnings provide additional information about a specific task. They help you to have a better understanding of the task and use the application effectively. Notes, tips, and warnings are identified by the following graphics:

This symbol signifies a note. A note provides additional information about a specific task.

This symbol signifies a tip. A tip provides useful hints that you can use to perform a specific task more easily.

This symbol signifies a warning. A warning is a message that cautions you about the danger involved in a specific task and the precaution you need to take when performing the task.

Chapter 2. Getting Started

Getting Started introduces you to Ariel's user interface and helps you start working with it.

This chapter provides the procedural information, step-by-step instructions, and other information that you need for using Ariel. It consists of the following sections:

- Overview
- Accessing Ariel
- Navigating within Ariel
- Database Maintenance
- Error Messages

Overview

This section explains the tasks involved in accessing Ariel and navigating within it. It also provides procedural and task related information for performing database back up and restoration. It is recommended that you read this section before you start using the application.

Accessing Ariel

Ariel is a client/server application used for transferring documents between libraries. After Ariel is installed on your computer, you can access it from the Windows **Start** menu. You can place a shortcut for Ariel on the desktop or in the Windows taskbar. You can perform various document management tasks after you access Ariel.

This section discusses the various requirements and constraints in working with Ariel and consists of the following sections:

- System Requirements
- Logging On to Ariel
- Logging Off from Ariel
- Registering Ariel

System Requirements

This section discusses the minimum hardware and software required for Ariel.

Hardware Requirements

The minimum hardware requirements to access Ariel are described in the following table:

Hardware	Requirements
For Server	
Processor	Pentium with speed of 450 MHz or faster. For PDF delivery, Pentium III with speed of 650 MHz or faster is required.
Hard Drive	Average users need 50-100 MB for managing document files. For working with grayscale/color documents, 50-300 MB is required. For PDF delivery, up to 20 GB is required depending on usage and retention policies.

Hardware	Requirements
RAM	For average usage, 128 MB or more is required. For working with grayscale/color documents, 256 MB or more is required. A faster processor and more RAM will improve performance of the application.
Scanner	Scanners compatible with ISIS or TWAIN driver.
Printer	Windows compatible (Postscript printing not recommended).
For Clients	
Processor	Pentium with speed of 450 MHz or faster. For PDF delivery, Pentium III with speed of 650 MHz or faster is required.
Hard Drive	Average users need 50-100 MB for managing program files.
RAM	For average usage, 128 MB or more is required. For working with grayscale/color documents, 256 MB or more is required. A faster processor and more RAM will improve performance of the application.
Scanners	Scanners compatible with ISIS or TWAIN driver.
Printer	Windows compatible (Postscript printing not recommended).

A CD ROM drive is essential for installing Ariel.

Software Requirements

The minimum software requirements to access Ariel are described in the following table:

Software	Requirements
For Server	
Operating System	Windows 2000 or XP Professional, Lead Tools Raster Imaging Pro 14.0.
Database	Microsoft SQL Server 2000 Desktop Engine (MSDE 2000). MSDE 2000 is a data engine built and based on core SQL Server technology. It is a reliable storage engine and query processor for desktop extensions of enterprise applications. It is used for building advanced database features in desktop applications.
Internet Access	Direct high-speed connection to the Internet through a Local Area Network (LAN). For FTP, a permanent IP address for the Ariel PC (usually through an Ethernet LAN) is required.
For Clients	
Operating System	Windows 2000 or XP Professional, Lead Tools Raster Imaging Pro 14.0.
Internet Access	Direct high-speed connection to the Internet through a Local Area Network (LAN). For FTP, a permanent IP address for the Ariel PC (usually through an Ethernet LAN) is required.

Logging On to Ariel

You can log on to Ariel from the Windows **Start** menu or you can click the shortcut placed on your desktop.

Step by Step

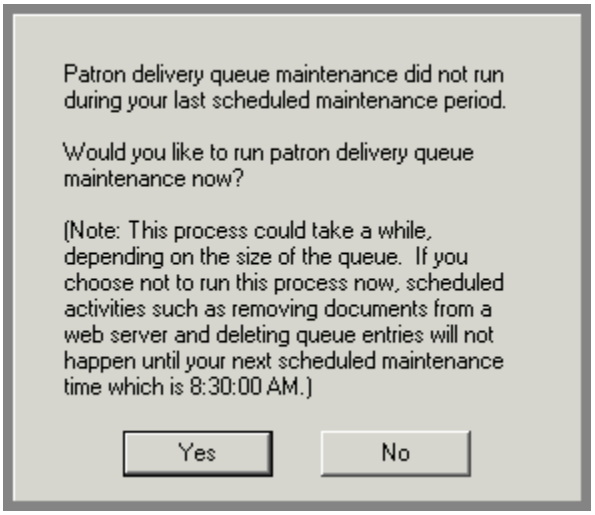
Logging on to Ariel consists of selecting the application from the Windows Start menu.

Logging On

To log on to Ariel:

Step 1. Click **Start** in the Windows taskbar. The Windows Start menu is displayed.

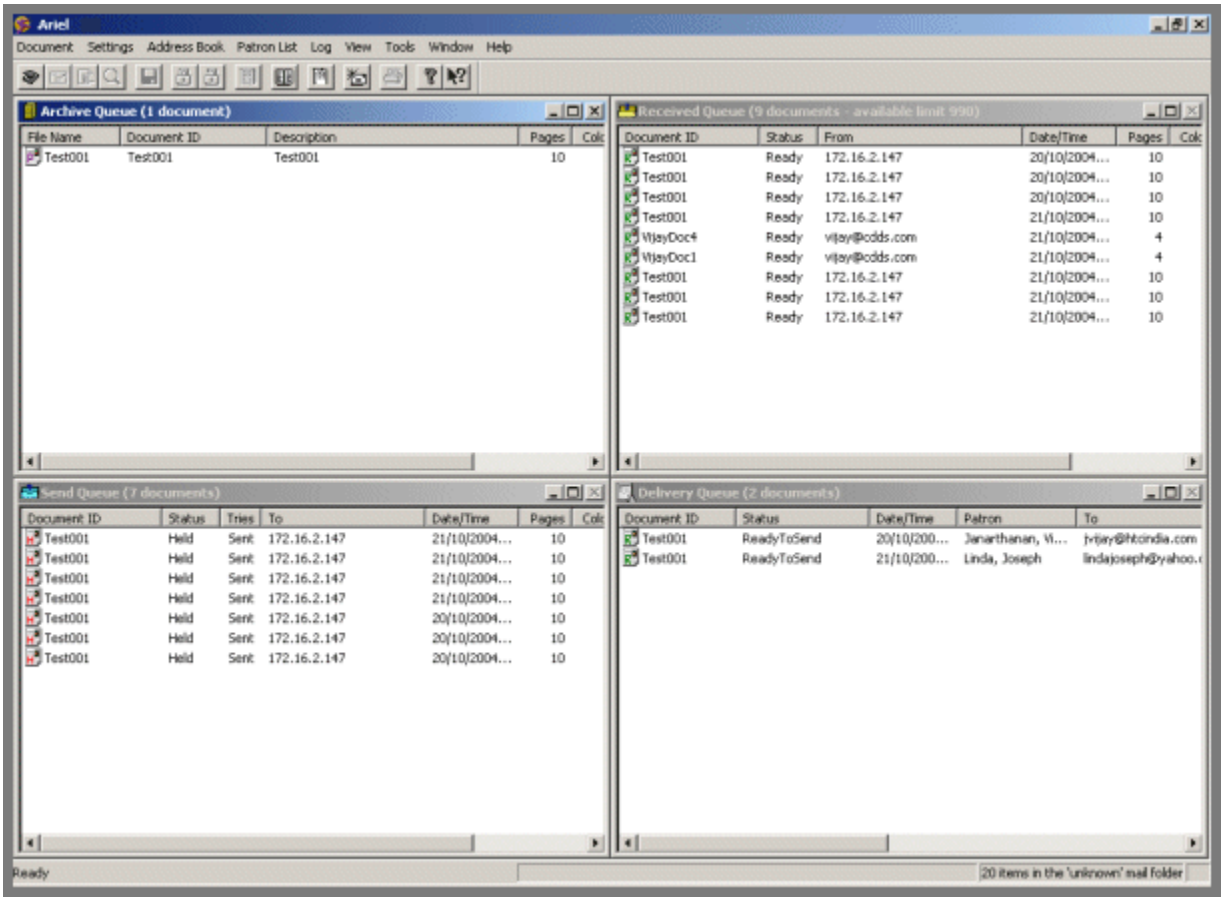
Step 2. Select **Programs → Ariel → Ariel**. The Ariel window is displayed. The application name is displayed in the title bar. If your system is shutdown during the scheduled daily maintenance period for the Delivery Queue window, the application prompts you to run the scheduled maintenance at startup.


Patron delivery queue maintenance did not run during your last scheduled maintenance period.
Would you like to run patron delivery queue maintenance now?
(Note: This process could take a while, depending on the size of the queue. If you choose not to run this process now, scheduled activities such as removing documents from a web server and deleting queue entries will not happen until your next scheduled maintenance time which is 8:30:00 AM.)
Yes
No

Step 3. Click **Yes** to run the scheduled maintenance at the start of the application.

Step 4. You can also click **No** to run the maintenance at the next scheduled time.

Step 5. Ariel is displayed with the Send, Received, Delivery, and Archive Queue windows.


Ariel
Document Settings Address Book Patron List Log View Tools Window Help
Archive Queue (1 document)
File Name Document ID Description Pages
Test001 Test001 Test001 10
Received Queue (9 documents - available limit 990)
Document ID Status From Date/Time Pages
Test001 Ready 172.16.2.147 20/10/2004... 10
Test001 Ready 172.16.2.147 20/10/2004... 10
Test001 Ready 172.16.2.147 20/10/2004... 10
Test001 Ready 172.16.2.147 21/10/2004... 10
VijayDoc4 Ready vijay@pcdds.com 21/10/2004... 4
VijayDoc1 Ready vijay@pcdds.com 21/10/2004... 4
Test001 Ready 172.16.2.147 21/10/2004... 10
Test001 Ready 172.16.2.147 21/10/2004... 10
Test001 Ready 172.16.2.147 21/10/2004... 10
Send Queue (7 documents)
Document ID Status Tries To Date/Time Pages
Test001 Held Sent 172.16.2.147 21/10/2004... 10
Test001 Held Sent 172.16.2.147 21/10/2004... 10
Test001 Held Sent 172.16.2.147 21/10/2004... 10
Test001 Held Sent 172.16.2.147 21/10/2004... 10
Test001 Held Sent 172.16.2.147 20/10/2004... 10
Test001 Held Sent 172.16.2.147 20/10/2004... 10
Test001 Held Sent 172.16.2.147 20/10/2004... 10
Delivery Queue (2 documents)
Document ID Status Date/Time Patron To
Test001 ReadyToSend 20/10/200... Janarthanan, Vi... jvijay@htcindia.com
Test001 ReadyToSend 21/10/200... Linda, Joseph lindajoseph@yahoo.
Ready
20 items in the 'unknown' mail folder

Based on the folder name specified by you during the installation of Ariel, you have to select the folder to access Ariel. For example, If you have placed Ariel in the folder Accessories, you need to access the application by selecting ***Programs → Accessories → Ariel.***

Logging Off from Ariel

You can exit from Ariel once you have finished using it. To prevent any unauthorized use of Ariel, especially when you are using a computer that is also used by others, ensure that you exit the application after you finish using it.

Step by Step

You can log off from Ariel after you have finished using it.

Logging Off

To log off from Ariel:

Step 1. Click **Document → Exit**. Ariel is closed. You are now logged off from Ariel. You can also click to log off from Ariel.

Registering Ariel

Registration is an important part of every application where you have to specify the details of the user and your system.

You can enter the registration details after installing Ariel. The registration details have to be entered individually for all the systems where Ariel is installed. This is because Ariel automatically sends the Internet Protocol address and machine name of a specific system along with the information you enter in the **Site** Registration window to the Ariel directory maintained by Infotrieve, Inc. The registration details that you enter are linked to a single Internet Protocol address. If the Internet Protocol address of your system changes, you may have to register again with the new address. As the Ariel directory provides information to all Ariel users, it is important to maintain the registration information up-to-date.

1. To delete the old Internet Protocol address from the Ariel directory, you can send an E-mail to ariel@infotrieve.com.

2. The information about registration is stored in the Ariel directory maintained by Infotrieve, Inc.

By registering your application, you will be listed in Infotrieve's Ariel users' database and can also subscribe to the Ariel electronic discussion group to share information and ideas about Ariel. You can also search for details of other Ariel users by registering with Ariel.

You can use a proxy server for working with Ariel. You can specify the proxy server details in the Site Registration window. A proxy server is a device that manages Internet traffic to and from a local area network and can provide other features, such as document caching and access control.

You can use the Site Registration window to enter the registration details.

Field Description

The fields in the Site Registration window are described in the following table:

Field Name	Field Descriptions
CD Key	A unique code given to a CD that is used for installing Ariel. You can enter only five characters in each text box. The CD key will be available on the CD cover of the application. If you purchase the application directly from Infotrieve, the CD key is provided in your order confirmation and email order confirmation. Note: This is a mandatory field.
Organization	The name of your organization. This is a mandatory field.
Organization type	The type of organization. For example, medical library or a university library. You can select the required option from the drop-down list. The options available are Public University, Private University, Non-profit Research, Medical Hospital, Library, and Other. These are predefined in the application.
Library	The name of library. This is a mandatory field.

Field Name	Field Descriptions
OCLC symbol	The Online Computer Library Center ID of the site.
Address 1 and Address 2	The address details of the library. The address details can be entered in the Address 1 and Address 2 fields respectively. Entering information in Address 1 is mandatory.
City	The city where the library is located. This is a mandatory field.
State/Province	The state or province where the Ariel workstation is located. This is a mandatory field.
Country	The country where the Ariel workstation is located.
Zip/ Postal code	The ZIP or postal code of the area where the Ariel workstation is located. This is a mandatory field.
Station E-mail	The E-mail address of the Ariel workstation to which documents can be sent.
Prefer over FTP	Select this check box if you want to receive documents only through email.
Contact Person	The name of a person who can be contacted for clarifications related to Ariel. This is a mandatory field.
Phone	The phone number of the contact person.
Fax	The fax number of the contact person.
Contact E-mail	The E-mail ID of the contact person. This is a mandatory field.

Field Name	Field Descriptions
How did you hear about Ariel	The information source by which you came to know about Ariel. You can select a required source from the drop-down list. The options available are Web Site, Current Customer, Mail Piece, Advertisement, Trade Show, and Coworker.
Year first purchased Ariel	The year in which the application was purchased.
Additional Instructions	Any remark or note about the application.
Use Proxy server	Select this check box to use the proxy server for Ariel on your system.
Proxy Settings	
Address (URL)	The URL address of the proxy server. This field is enabled only when the **Use Proxy Server** check box is selected.
Port	The port number for the proxy server. This field is enabled only when the **Use Proxy Server** check box is selected.
User ID	A unique ID assigned to the user who is authorized to access the proxy server. This field is enabled only when the **Use Proxy Server** check box is selected.
Password	The password for the accessing the proxy server. This field is enabled only when the **Use Proxy Server** check box is selected.

Field Name	Field Descriptions
Don’t include me in the Ariel User’s List	Select this check box if you do not want to be listed in Infotrieve's Ariel users’ database. Infotrieve's Ariel users database maintains a list of all the Ariel users. You can search for other Ariel users using the database. If you select this check box, you will not be included in the Infotrieve's Ariel users’ database.

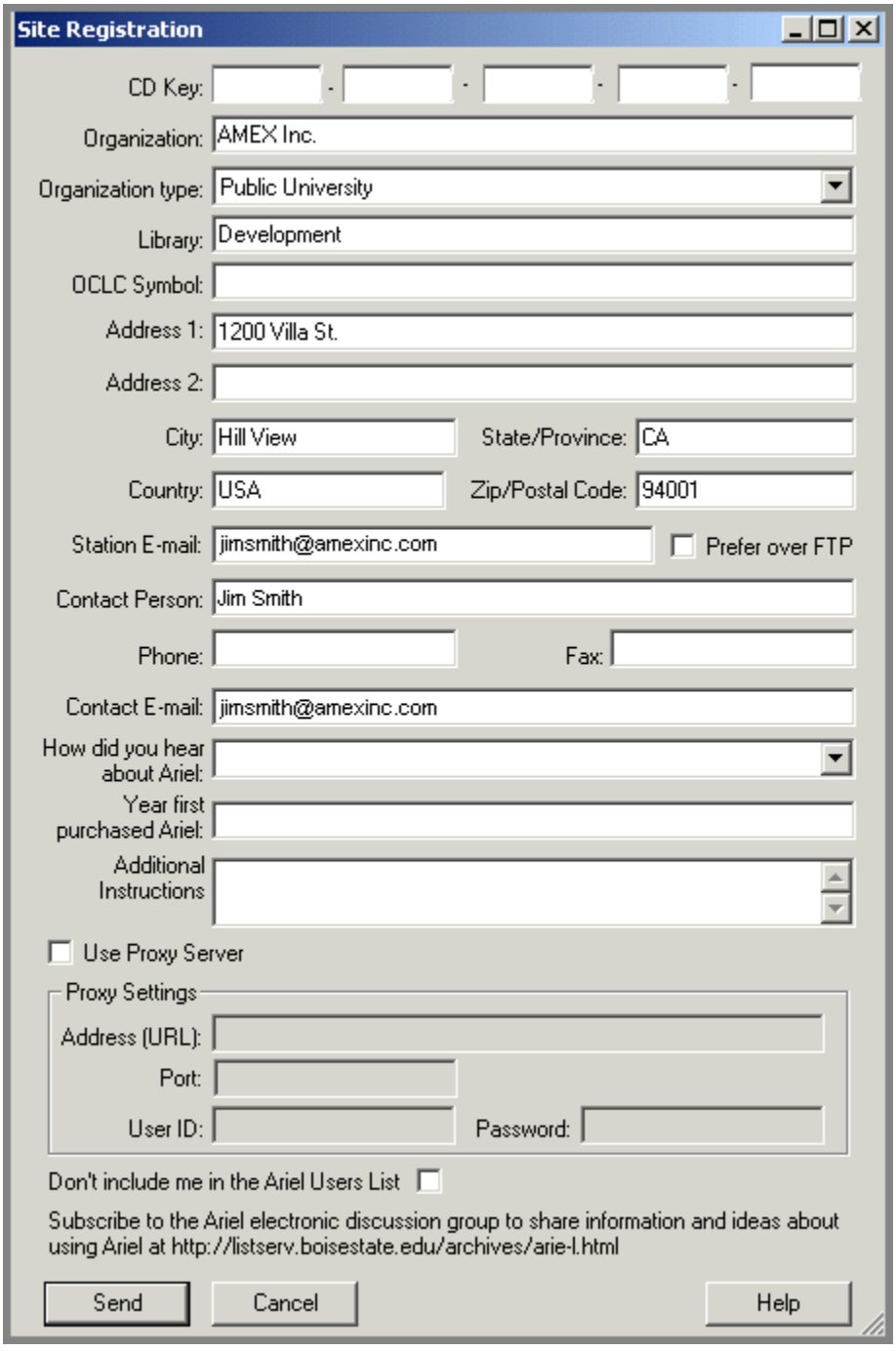
Step by Step

You can access and register Ariel through the Site Registration window.

Accessing the Site Registration window

To access the Site Registration window:

Step 1. Select **Help → Registration...** The Site Registration window is displayed.



Step 2. Submit and maintain the registration details.

Registering Ariel

To enter the registration details:

Step 1. Enter the relevant details in the respective fields.

Step 2. Click **Send** to register Ariel with Infotrieve's Registration server.

Step 3. Ariel checks if all the mandatory fields have been filled and submits the registration request to Infotrieve's Registration server. The server verifies the CD key and saves the CD key, product ID, and other registration information.

Step 4. Once the registration confirmation is received from the Infotrieve's Registration server Ariel can then be used. If a negative confirmation message is received, an appropriate message is displayed and the application may shut down.

To register Ariel application, you must be connected to the Internet.

Navigating within Ariel

This section provides procedural information for navigating through Ariel. This section also provides a detailed description of the windows layout and the window elements used in Ariel. It consists of the following sections:

- Navigating through the Main Menu
- Accessing the Toolbars
- Ariel Windows Layout
- Ariel Window Elements

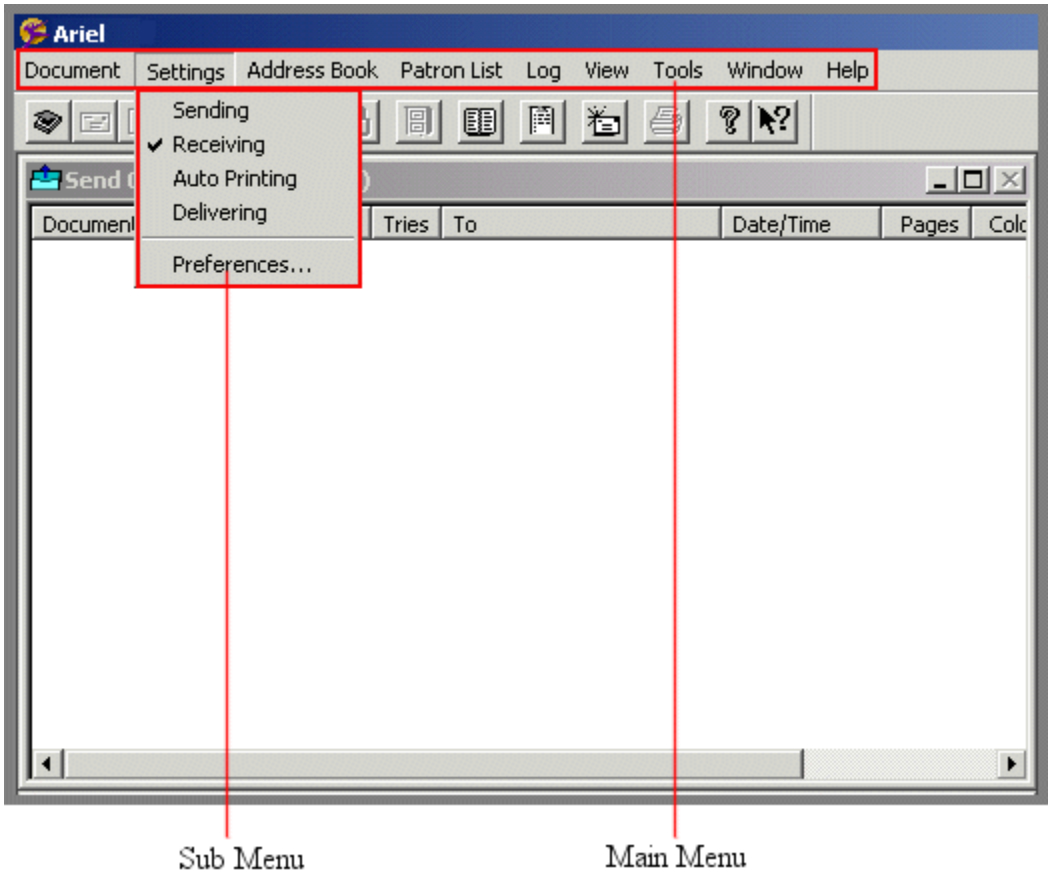
Navigating through the Main Menu

Navigation within Ariel is primarily done through the main menus. The main menus represent the different modules of the application. You can use the main menus to set up various options required for managing the document details in all the Queue windows. In addition, you can manage the address details of the Ariel workstations and patrons, view log details, and transfer details of documents sent or received.

Main Menu

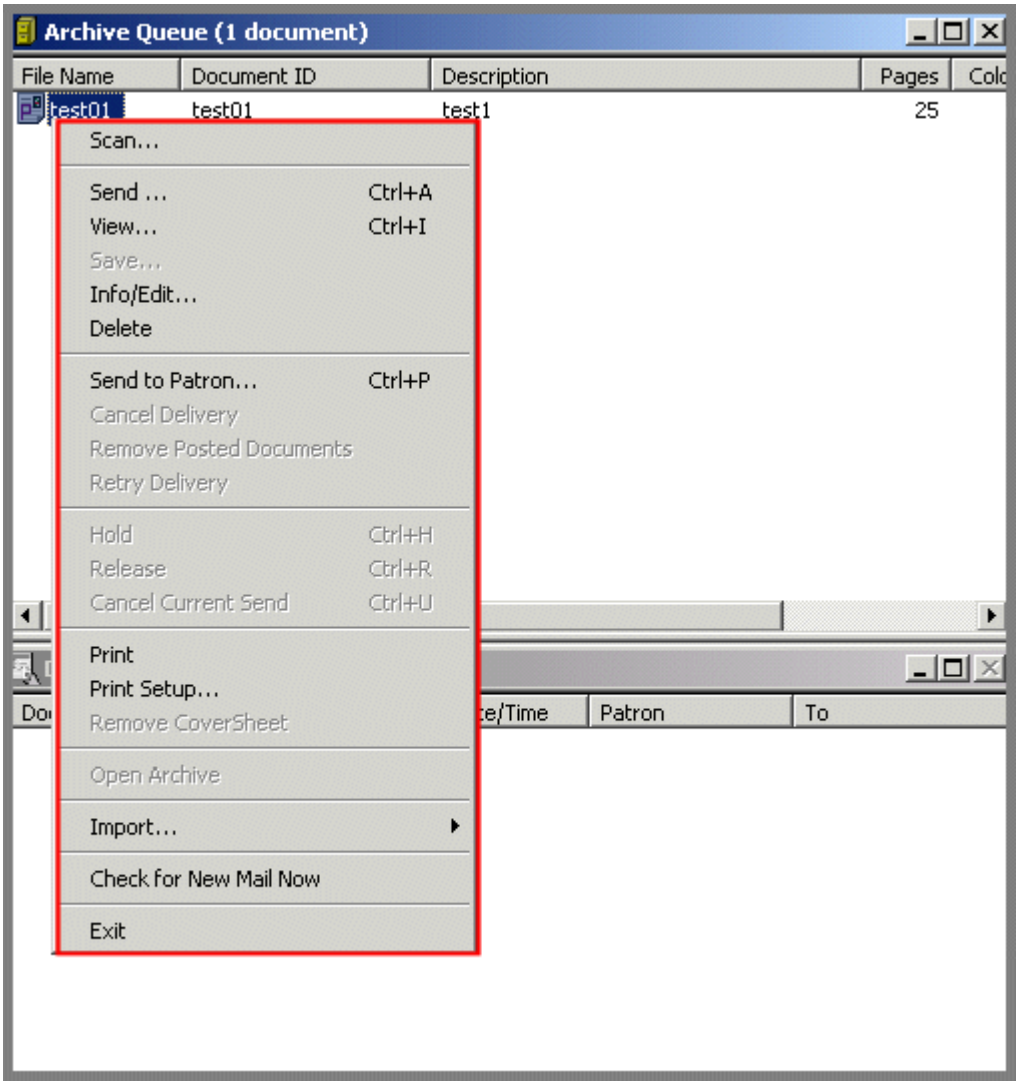
The Main menu is provided for easy access to all the features of Ariel. The main menu consists of submenus. Each menu represents a feature of Ariel. You can click on a menu to access a specific feature. When you click on a submenu, it is highlighted indicating

that it is the currently accessed feature. You can access any feature from anywhere in the application through the main menu.



Shortcut Menu

The Shortcut menu is a context-sensitive menu that appears when you right-click on specific field in a Details window. Clicking on a shortcut menu item will display the corresponding secondary window related to the field.



The shortcut menus are available in all the Queue windows. Based on the document management tasks you can perform in each Queue window, the items in the shortcut menu will be enabled or disabled. For example, 'Hold' will be enabled only in the Send, Received, and Delivery Queue windows.

Accessing the Toolbars

The toolbar is a graphic user interface with a set of icons representing the various frequently used tasks in the application. The toolbar makes it easy to access the various tasks in the application.

You can perform some of the common tasks using the toolbar buttons that are displayed next to the main menu. The toolbar buttons will be displayed when you select **Toolbar** from the **View** menu. A tick mark appears before the toolbar submenu. You can select the **Toolbar** submenu again to hide the toolbar.

In Ariel, the toolbar buttons are enabled or disabled based on the tasks you can perform in the respective Queue windows. For example, the **Save** toolbar button will be enabled in the Send, Received, and Delivery Queue windows and disabled in the Archive Queue window.

Field Descriptions

The toolbar buttons used in Ariel are discussed in the following table.

Button	Used for
	Scanning pages of a document. The Scan window will be displayed when you click this button.
	Sending documents to Ariel workstations. The Send window will be displayed when you click this button. You can send documents to Ariel workstations using this window.
	Sending documents to patrons. The Send to Patron window will be displayed when you click this button. You can send documents to patrons using this window.
	Viewing a selected document. The View Document window will be displayed when you click this button.

Button	Used for
	Saving a selected document to the Archive Queue window. The Save window will be displayed when you click this button. This button is enabled only in the Send, Received, and Delivery Queue windows.
	Holding a selected document in the Send, Delivery, and Received Queue windows.
	Releasing a selected document in the Send, Delivery, and Received Queue windows. Once the document is released, the status is changed to ‘Ready’, ‘Ready to be Sent’, and ‘Ready to be Posted’ in the respective Queue window.
	Opening the Archive Queue window if the window is closed.
	Creating and maintaining the addresses of Ariel workstations. The Address Book window will be displayed. You can select the existing address or add, modify, or delete the address details.
	Viewing the log details of documents sent or received in the application. The Ariel Log Viewer window will be displayed when you click this button.
	Checking for new mails you have received in the Received Queue window.
	Printing a document. The Print dialog box will be displayed. You can select the required options to print the document.
	Viewing the version and copyright information of the application.

Button	Used for
	Selecting the help topics related to a specific window in the application. A pointer is displayed when you click this button. You can use the pointer to navigate to a specific window. You can click the specific window and the help topic related to the window will be displayed.

Ariel Windows Layout

On logging on to the application, the Ariel window is displayed. The Ariel windows layout consists of Archive, Received, Send, and Delivery Queue windows.

All the four Queue windows are displayed when you log on to the application. Each Queue performs a different task and has features specific to it. For example, in the Archive Queue window, you can save documents that are scanned, imported, and are available in the Send, Delivery, and Received Queue windows.

The Archive Queue window displays the list of documents saved from the Send, Delivery, and Received Queue window. The documents that are scanned or imported can also be saved in the Archive Queue window. The Send Queue window displays the list of documents that are being sent to Ariel workstations. The Delivery Queue window displays the list of documents that are being sent to patrons. The Received Queue window displays the list of documents received from other Ariel workstations.

You can view all the Queue windows together by reducing the size of the windows appropriately. You can resize the Queue windows by clicking the mouse and dragging the corners of the window. You can place the Queue windows in any place within Ariel by clicking on the window and dragging the title bar of the window.

You can maximize the window, by clicking . To minimize, you can click . You cannot close the Send, Delivery, and Received Queue windows. Only the Archive window can be closed by clicking . To restore the window to its original size, you can click .

Ariel Window Elements

In Ariel, every window consists of elements that you can use to perform specific tasks. For example, you can enter data using text boxes or list information using drop-down lists. The window elements used in Ariel are described in detail in this section. The Ariel window elements are:

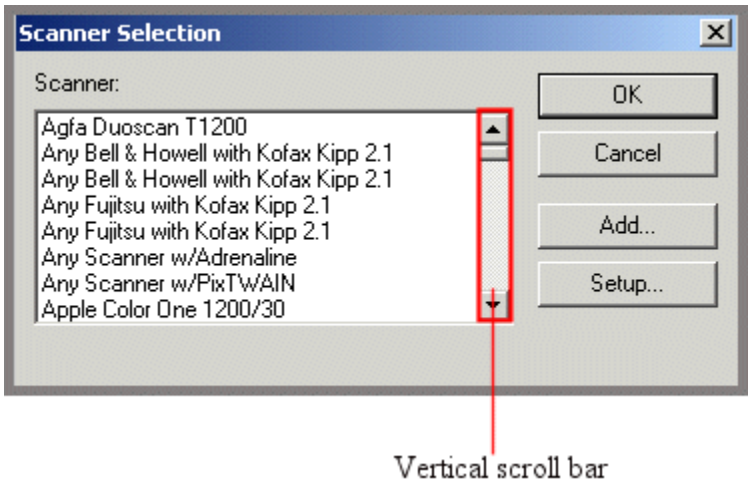
- Check Box
- Scroll Bar
- Message Box
- Option Button
- Drop-down List
- Spin Box
- Text Box
- Text Area
- List Box
- Mandatory Field
- Calendar Lookup
- Command Buttons

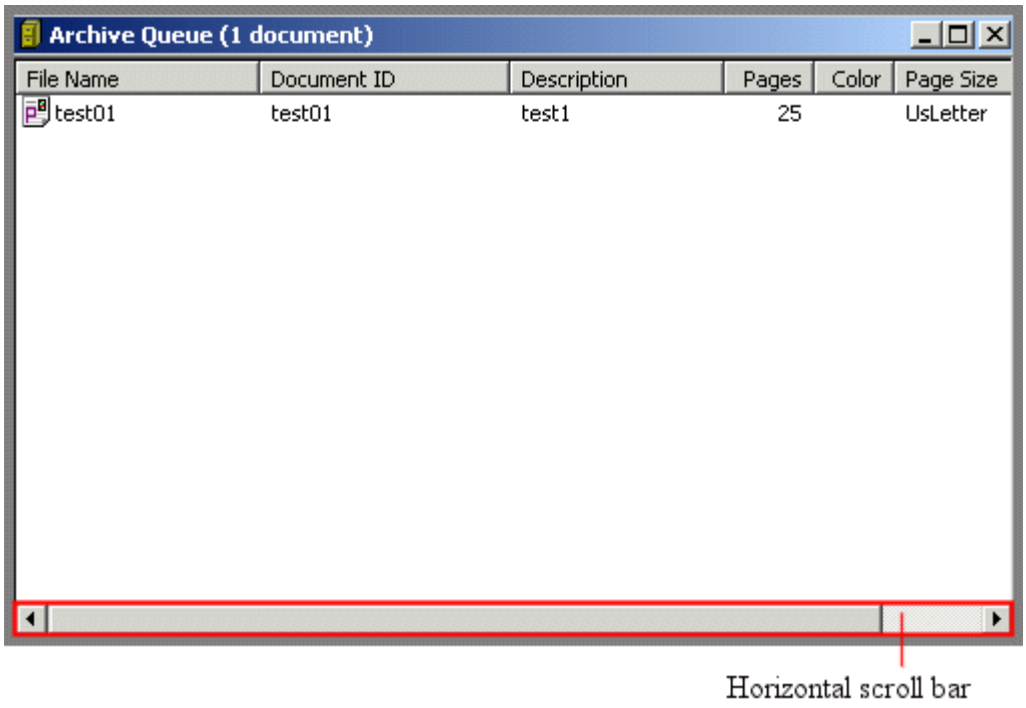
Check Box

A check box is a small, square box that you can click to select an option. Selecting a check box enables that specific option. Multiple check box options can be enabled at the same time within a given set of options. When you select a check box, a (tick mark) appears in the box. To clear the selected option, click the check box again. The tick mark disappears.

Scroll Bar

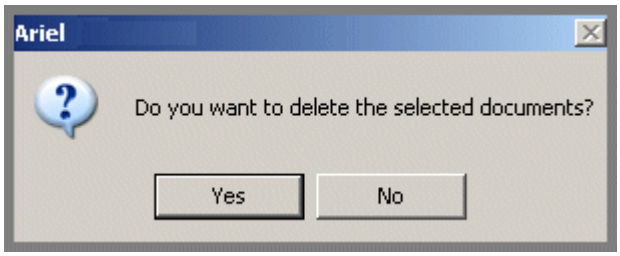
The scroll bar is a vertical or horizontal bar at the side or bottom of a display area that can be used with a mouse for moving around in that area.





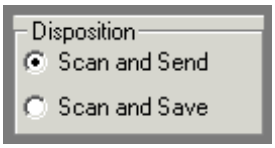
Message Box

A message box displays a message seeking your confirmation to execute a task. For example, when you click **Delete** on selecting a document in any of the Queue windows, a confirmation message for deletion is displayed. You can click **OK** to delete the document or click **Cancel** to cancel the deletion. The following is an example of a message box.



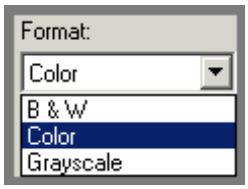
Option Button

The option button is a small, circular button that displays a large dot when you select it. Selecting an option enables that specific selection and disables all others in the set of options. For example, in the Disposition section of the Scan window, you can either select the **Scan and Send** option or **Scan and Save** option.



Drop-down List

A drop-down list is a list of values that is displayed in a rectangular box when you click provided adjacent to certain fields. You can select an item from the list to be displayed in the field. If the list is longer than can be displayed, a vertical scroll bar will appear to scroll the list.



To select a value from the drop-down list:

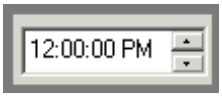
Step 1. Click next to the field where the data is to be selected from a drop-down list. The drop-down list is displayed.

Step 2. Click on an item that you want to select. The selected item is displayed in the field.

Spin Box

A spin box is a text box with up and down arrows that the user clicks to move ("spin") through a set of fixed values. For example date and time. The user can also type a valid value in the box by selecting the relevant field in the spin box.

The following table explains the spin box used in Ariel:

Spin Box	Used To
	Set the time duration for daily maintenance of the application. You can specify this by entering the time in hh:mm:ss (12-hour) format. You can also use the up and down arrow buttons for changing the time. For example, to change the time from 10:30:33 am to 11:30:33 am, click on the hour and click the up arrow button.

Text Box

A text box is a rectangular box in which you can enter text. You can click the text box and type the required text. If the text box already contains text, you can delete the existing text and type a new text or click wherever necessary and edit the text.

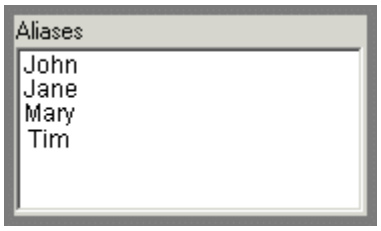
Text Area

A text area is a rectangular box with up and down arrow keys for navigation. In a text area, you can write multiple lines of text. You can move the (up) and (down) arrow keys to view the text written. You can click in the text area and type the required text. If the text area already contains text, you can delete the existing text and type new text or click wherever necessary and edit the text.

Enter text of message:
The document you requested has been posted on the web. To retrieve your document, you will need your PIN number [$$PIN$$].

List Box

A list box is a list of values that is displayed in a rectangular box. You can select multiple items from the list. If the list of values is longer than can be displayed, a vertical scroll bar will appear to scroll the list. To select a value from the list, click on the value. The value will be highlighted. To select multiple items, you can select the values while pressing the **Control** key on the keyboard. To deselect the value, select the value again while pressing the **Control** key on the keyboard.



Calendar Lookup

A Calendar lookup is used to select month, date, and year for the date fields. When you click next to the date fields, the Calendar lookup is displayed and the current date will be highlighted.

By default, the current month, year, and day will be displayed in the Calendar lookup. The current date will be highlighted in blue.

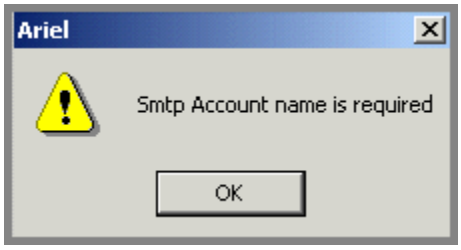
To select a date from the Calendar lookup:

Step 1. Click (left) or (right) arrow button to select the specific month and year.

Step 2. Select the required date by clicking it. The Calendar lookup is closed and the selected date is displayed in the date field.

Mandatory Field

Mandatory fields are critical fields in a window for which you must enter data. For example, in the Add New Address window, the Alias and Address fields are mandatory fields.If you do not enter data for mandatory fields and try to save the settings, a message will prompt you to enter the required data. For example, In the **Mail** tab of the Preferences window, if you do not specify the SMTP account name for outgoing mails settings, a message will be displayed that the SMTP Account name is required.

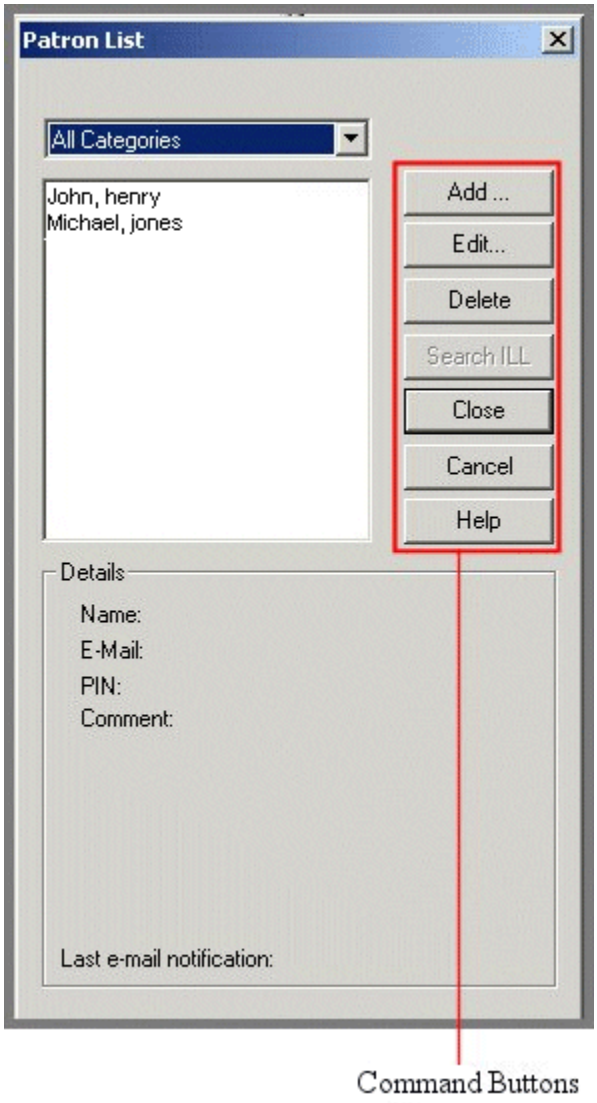


Command Buttons

Command buttons are window elements provided to help you perform tasks such as adding, modifying, and deleting information in a specific window. You can click a command button to perform a specific task. For example, you can click **Add** in the Patron List window to add details of a patron.

In some of the windows of Ariel, you may find command buttons that are disabled. These buttons are enabled or disabled based on the functional state of the application. For example, **Search ILL** is

enabled only when the application is connected to an external ILL patron database.



Some of the command buttons used in Ariel are described in the following table.

Buttons	Used to
	Add new record. When you click this button, a blank record is displayed in a new window.
	Edit or update an existing record. When you click this button, the details of the record are displayed in the update window. To edit the information you have to select the record to be edited and then click the Edit button.
	Delete a record. When you click this button, a message is displayed to confirm deletion. Click **Yes** to delete the record or click **No** to cancel deletion.
	Save and apply the changes made to the various setting options in the Preferences window. When you click this button, the changes are saved.
	Execute the task in a specific window. When you click this button, the changes are updated and the window is closed.
	To close the window without saving the changes.
	Close the window and return to the main window.
	To view the help topics related to a specific window.
	To open a folder or document selected.
	To browse the path of a document.

Database Maintenance

Database is a collection of information organized and presented to serve a specific purpose. For example, a telephone book. A computerized database is an updated, organized file of machine readable information that is rapidly searched and retrieved by computer.

Ariel makes use of MSDE Database to maintain all the queue information and statuses. Separate database servers will be installed and the application can access the database through network. Ariel constantly keeps adding and updating the database as it transmits and receives documents. In case of two or more servers you may have a shared database on which multiple servers work. The shared databases can be accessed through a network and the path of the Queue windows in the winariel.ini file must point to the shared database. Only authorized persons can access the shared database to perform database operations. This section discusses the procedural and task related information for performing tasks such as database backup and restoring the database.

- Database Backup
- Restoring the Database

The tasks discussed in this section are for a single server environment.

Database Backup

You need to make a backup of the database to save and later restore the data from unforeseen catastrophes that might damage your database. You can make a backup of the database to setup the database in another network or for maintenance purposes. After making a backup you can also restore the database.

As a preventive action it is advisable to make frequent backups of the database. In case your system crashes, you can restore the database to the database server. By restoring the database, you can make the existing Ariel application work.

You can also use an external backup and restore tool to make a back up of the database. In Ariel, you cannot make a backup of the database to which Ariel is connected. Therefore an external backup tool can be used to make a back up of the database that is currently being used by Ariel. You can

restore the database only through the restore option of the external back up and restore tool.

For making the back up of the database, you need to specify the valid SQL Server authentication user name and password. If you are using an existing MSDE to create a database, then the existing user name and password for the SQL Server must be specified in the Back Up window. If MSDE is installed during Ariel installation, then the default user ID “sa” and password “ariel” must be specified while making the back up of the database.

While making a back up of the database, you can specify the Internet Protocol address or the system name of the database server. You can also specify the Internet Protocol address or the system name of the location where the database has to be made.

You can use the Back Up window to make a backup of your database.

The command buttons in the Back Up window are described in the following table:

Button	Used to
	List all the database available. You have to click on the database to enable the Database field.

Field Descriptions

The fields in the Back Up window are described in the following table:

Field Name	Field Description
Server Name	The name of the server where the database resides. You can also specify the Internet Protocol address or the system name in this field. For example, you can specify the server name as ‘\\172.12.09.1’ or ‘Ariel workstation 1.’
User Name	The name of the user who is authorized to access the SQL database.

Field Name	Field Description
Password	The password of the user who is authorized to access the SQL database.
Database	The name of the database. You can select the required option from the drop-down list. You can select the database for which back up needs to be made.
Path	The location where the database backup file will be saved. You can also specify the Internet Protocol address or the system name in this field followed by the folder name. For example, you can specify the path as '\\172.12.09.1\folder1.'

Before You Begin

In a network, before making the backup, create a folder in the system where the database server resides and give full sharing permission to that folder. You can write and save the database only if full access permission is given to the folder.

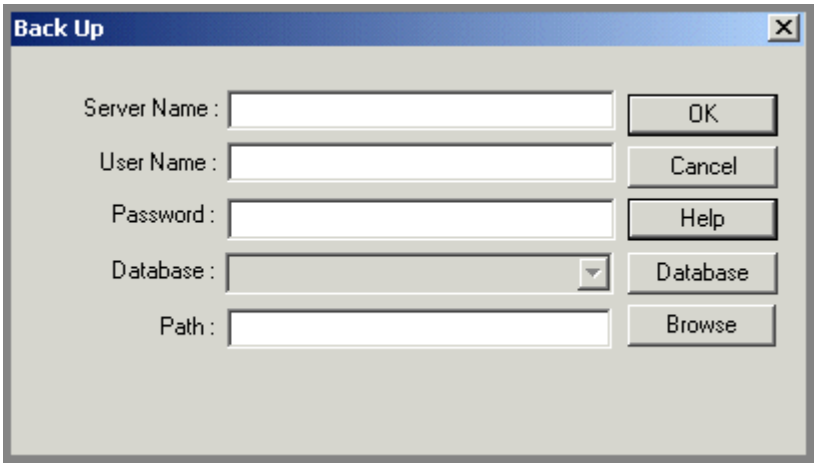
Step by Step

You can make a backup of the database from the application using the Back Up window. You can also make a backup of the database using an external back up and restore tool.

Backing Up the Database

To make a backup of the database:

Step 1. In Ariel, select **Tools → Backup**. The Back Up window is displayed.



Step 2. Specify the name of the server in the server name field. You can also specify the Internet Protocol address or the system name in this field. For example, you can specify the server name as '\\172.12.09.1' or 'Ariel workstation 1.'

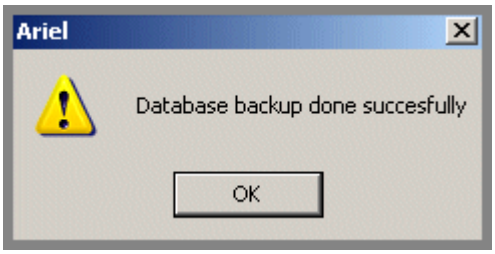
Step 3. Specify the valid SQL Server authentication user name in the UserName field.

Step 4. Specify the valid SQL Server authentication password in the Password field.

Step 5. Click **Database**. The list of all the databases will be displayed. Select the database for which a back up has to be made from the drop-down list.

Step 6. Click **Browse** to find a location to store the backup. You can also specify the Internet Protocol address or the system name in this field followed by the folder name. For example, you can specify the path as '\\172.12.09.1\folder1.'

Step 7. Click **OK.** The backup of the database will be saved in the .dat format. A message will be displayed stating the successful backup of the database.



1. You can also specify the Internet Protocol address of the server in the Server Name and Internet Protocol address of the system where the backup has to be made in the Path field.

2. A valid network path has to be specified for saving the back up made.

3. If an existing MSDE is being used to create a database, then the existing user name and password for the SQL Server must be specified in the Back Up window. If MSDE is installed during Ariel installation, then the default user ID "sa" and password "ariel" must be specified while making the back up of the database.

4. The backup file will be saved as a .dat file in the location specified.

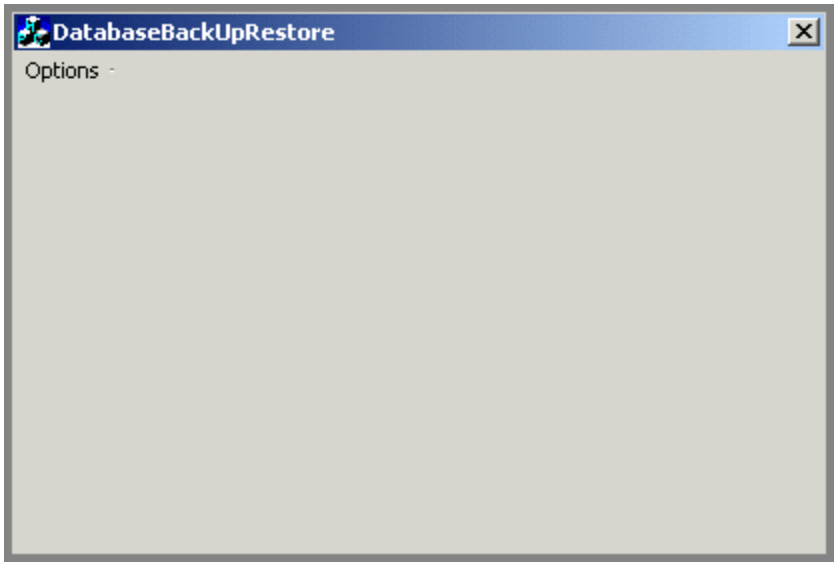
5. In the Server Name field you must specify the server name in the following format:
System name\ Server name.

6. When you specify the database name make sure that appropriate names are given for the database backups so that the correct version of the backup can be located and restored.

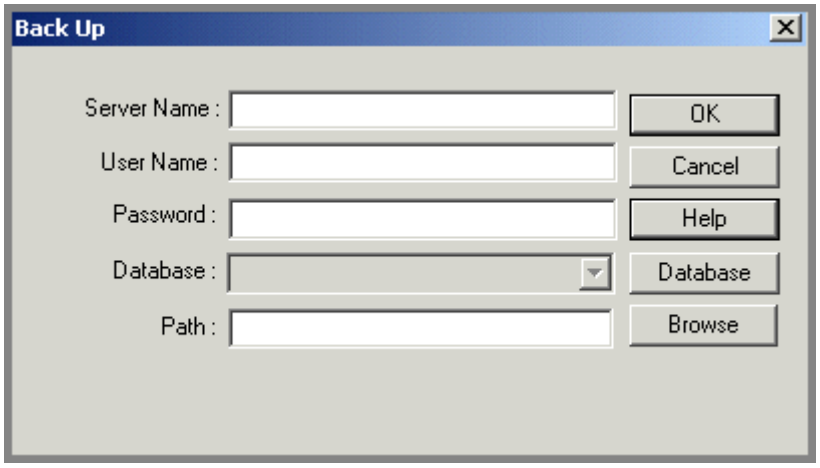
Backing Up Database Using External Tool

To make a backup of the database using an external back up tool:

Step 1. Access the DatabaseBackUpRestore tool.



Step 2. Select **Options → Back Up Database**. The Back Up window will be displayed.



Step 3. Enter the name of the server in the Server Name field. You can also specify the Internet Protocol address or the system name in this field. For example, you can specify the server name as '\\172.12.09.1' or 'Ariel workstation 1.'

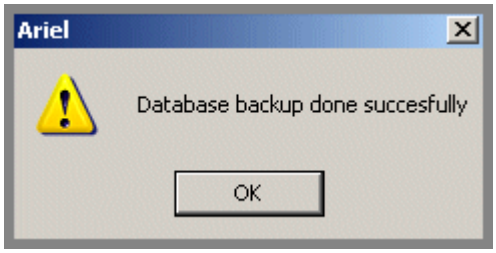
Step 4. Specify the valid SQL Server authentication user name in the UserName field.

Step 5. Specify the valid SQL Server authentication password in the Password field.

Step 6. Click **Database**. The list of all the databases will be displayed. Select the database for which a back up has to be taken from the drop-down list.

Step 7. Click **Browse** to specify the location and file name to save the database. You can also specify the Internet Protocol address or the system name in this field followed by the folder name. For example, you can specify the path as '\\172.12.09.1\folder1.'

Step 8. Click **OK**. The backup of the database will be saved in the .dat format. A message will be displayed stating the successful backup of the database.



1. You can also specify the Internet Protocol address of the server in the Server Name and Internet Protocol address of the system where the backup has to be made in the Path field.

2. If an existing MSDE is being used to create a database, then the existing user name and password for the SQL Server must be specified in the Back Up window. If MSDE is installed during Ariel installation, then the default user ID "sa" and password "ariel" must be specified while making a back up of the database.

3. A valid network path has to be specified for saving the back up made.

4. The backup file will be saved as a .dat file in the location specified.

5. In the Server Name field you must specify the server name in the following format:
System name\ Server name.

6. When you specify the database name make sure that appropriate names are given for the database backups so that the correct version of the backup can be located and restored.

7. While specifying the location where the back up has to be made, the data source name in which the ariel application is running automatically points to the restored database.

Restoring the Database

You can restore a database after a backup of it is made. A message is displayed stating that database restore is successful. You can also check for the restored database using tools such as Enterprise Resource Manager or SQL Query Analyzer. You can restore the database only using the external database backup and restore tool.

You can check for the restored database using tools such as the SQL Query Analyzer. In order to use the SQL Query Analyzer, you must install the complete version of the Microsoft SQL server. Checking for restored database using SQL Query Analyzer is given as an example in this section.

For restoring the database, you need to specify the valid SQL Server authentication user name and password. If you are using an existing MSDE to create or restore a database, then the existing user name and password for the SQL Server must be specified in the Restore window. If MSDE is installed during Ariel installation, then the default user ID “sa” and password “ariel” must be specified while restoring the database.

While making a back up of the database and restoring it, you can specify the Internet Protocol address or the system name of the database server. You can also specify the Internet Protocol address or the system name of the location where the database has to be made.

You can use the Restore window of the external back up and restore tool to restore the database.

Field Descriptions

The fields in the Restore window are described in the following table. Information in all the fields is mandatory:

Field Name	Field Description
Server Name	The name of the server where the database is to be restored. You can also specify the Internet Protocol address or the system name in this field. For example, you can specify the server name as ‘\\172.12.09.1’ or ‘Ariel workstation 1.’
User Name	The name of the user who is authorized to access the SQL database.

Field Name	Field Description
Password	The password of the user who is authorized to access the SQL database.
Database	The name of the database.
Path	The location of the database where the .dat file has to be restored. You can also specify the Internet Protocol address or the system name in this field followed by the folder name. For example, you can specify the path as '\\172.12.09.1\folder1.'

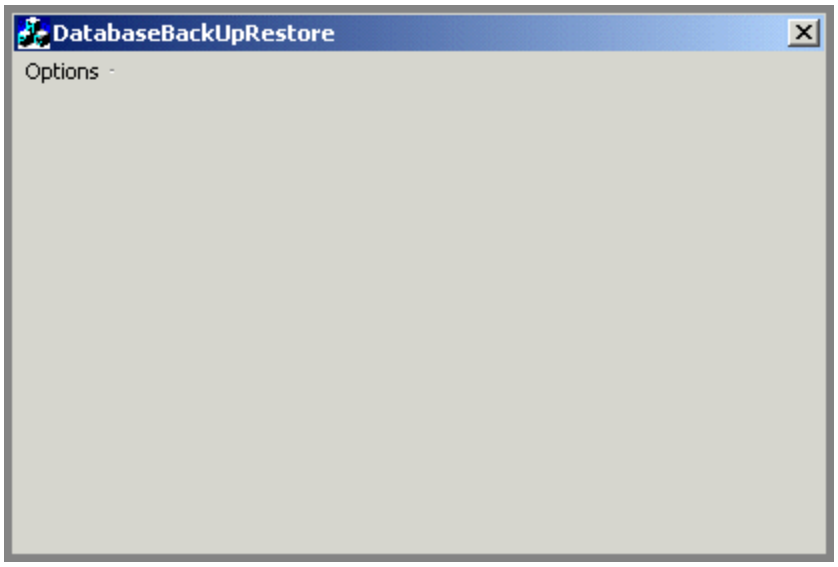
Step by Step

You can restore the database using an external back up and restore tool. In addition, you can also check for the restored database through the SQL Query Analyzer.

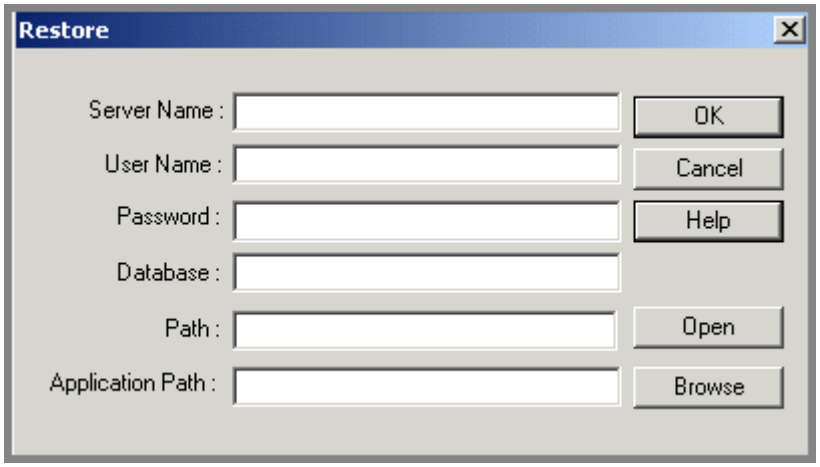
Restoring the Database Using External Tool

To restore the database using an external restore tool:

Step 1. Access the DatabaseBackUpRestore tool.



Step 2. Select **Options → Restore Database**. The Restore window is displayed.



Step 3. Enter the name of the server in the Server Name field. You can also specify the Internet Protocol address or the system name in this field. For example, you can specify the server name as '\\172.12.09.1' or 'Ariel workstation 1.'

Step 4. Specify the valid SQL Server authentication user name in the UserName field.

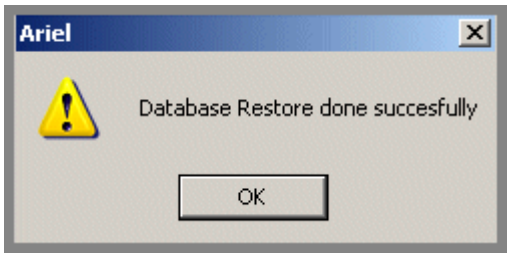
Step 5. Specify the valid SQL Server authentication password in the Password field.

Step 6. Specify the database name in the Database field.

Step 7. Click **Open** to search and locate the database saved in a .dat format. You can also specify the Internet Protocol address or the system name in this field followed by the folder name. For example, you can specify the path as '\\172.12.09.1\folder1.'

Step 8. Click **Browse** to specify the location of the winariel.ini file on your system. The DSN in which Ariel is running currently points to the restored database.

Step 9. Click **OK**. The database is restored and a message is displayed stating that restoration of the database is successful.



1. You can also specify the Internet Protocol address of the server in the Server Name and Internet Protocol address of the system where the database has to be restored in the Path field.

2. If an existing MSDE is being used to restore a database, then the existing user name and password for the SQL Server must be specified in the Restore window. If MSDE is installed during Ariel installation, then the default user ID "sa" and password "ariel" must be specified while restoring the database.

3. A valid network path has to be specified to locate the .dat file for restoring the database.

4. While restoring the backup database, search for .dat file in the location specified.

5. In the Server Name field you must specify the server name in the following format:
System name\ Server name.

6. When you specify the database name make sure that appropriate names are given for the database backups so that the correct version of the backup can be located and restored.

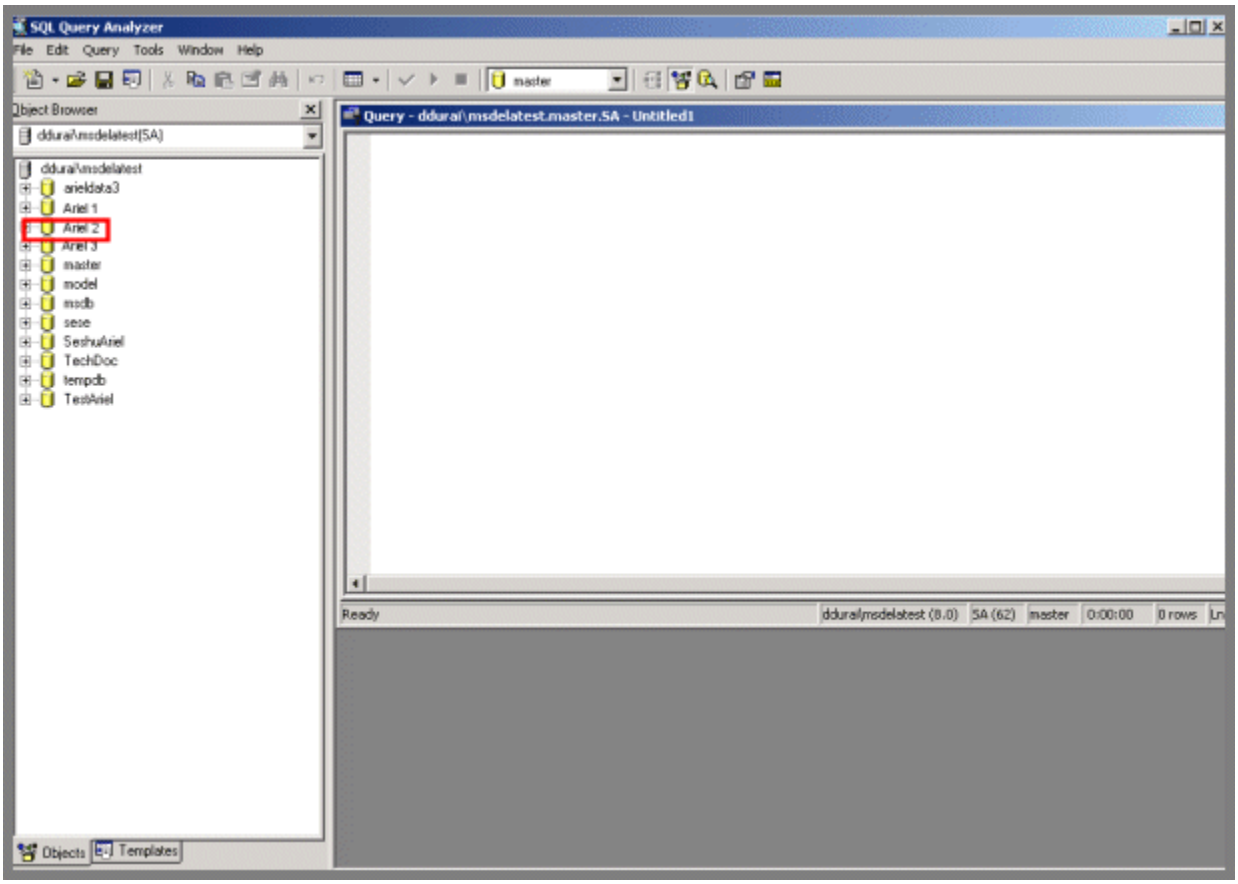
7. It is mandatory to specify all the fields in this window.

Checking the Restored Database

Checking for restored database using SQL Query Analyzer is given as an example.

To check for the restored database:

Step 1. Double-click SQL Query Analyzer icon from the desktop. The SQL Query Analyzer window is displayed.



Step 2. In the object browsing navigation pane, check for the newly created database name.

1. Ensure that the complete version of MS SQL server is installed on your system to view the SQL Query Analyzer.

2. Ensure that you do not delete the DSN.

3. The database driver specified must be SQL driver. Ariel will not work without the database driver.

4. The database name in both the DSN and winariel.ini file must be same for Ariel to work.

Error Messages

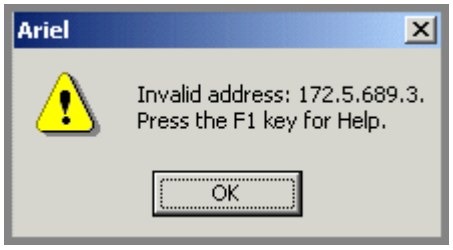
An error message is a notification from the system or program indicating that an error has occurred and needs to be resolved. The error message provides details about the error and how it can be resolved.

This section discusses the error messages that are displayed in Ariel when:

- Validating Internet Protocol Address
- Checking Printer Configuration
- Checking Document ID
- Checking Document Feeder for Scanning Documents
- Checking Alias Name in Add New Address Window
- Checking Internet Protocol Address in Add New Address Window
- Checking Scanner Initialization
- Checking SQL Server Connection
- Checking DSN Connection
- Checking Patron Categories for Sending Documents to Patrons
- Validating Dates in Bibliographic Info Window
- Checking for Imported Address Book and Patron List
- Logging Off while Working with Ariel
- Validating Dates in Log Files
- Checking the Passwords
- Checking the Database
- Validating Mail Servers
- Validating Email Addresses
- Checking Number of Documents
- Checking Files in OUT, DELIVERY, and SAVED Folders

Validating Internet Protocol Address

When you send documents to Ariel workstations, you need to specify the Internet Protocol address or the system name of the Ariel workstation in the Send window. If a valid Internet Protocol address or system name is not specified, an error message will be displayed stating that the address is invalid.

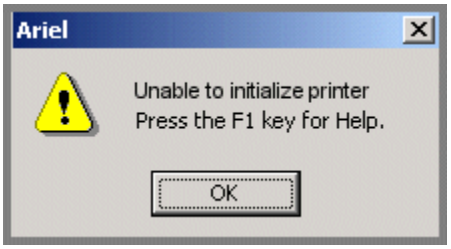


Click **OK** and enter a valid Internet Protocol address.

A valid Internet Protocol address consists of four sets of numbers separated by periods. For example, 204.161.106.157 is a valid Internet Protocol address. Similarly if you use a machine name, your Domain Name Server must be able to resolve the name to its respective Internet Protocol address.

Checking Printer Configuration

For printing documents in Ariel, you need to have a printer installed in your system. When you access Ariel, if the printer is not installed, an error message will be displayed stating that the printer is not initialized.

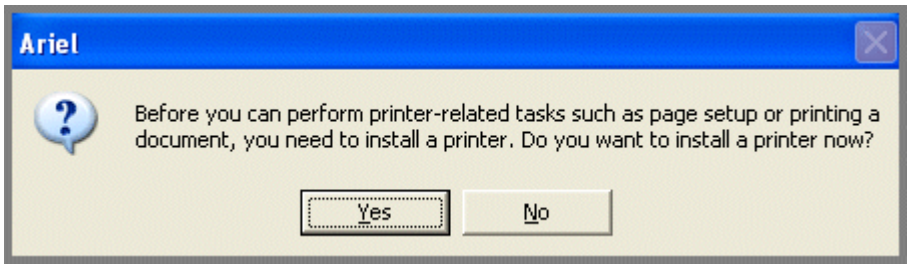


The reason why Ariel cannot communicate with your printer can be due the following reasons:

- You do not have a printer driver installed. Use the Windows Control Panel to install and connect the proper driver for your printer.

- Your printer is turned off or is off line. Check the power switch and power cable, and make sure the printer is online.
- Your printer cable is loose, disconnected, or plugged into the wrong port. Remove the cable from both the PC and the printer, check to make sure that the connectors are in good condition, and replace the connectors firmly in the proper ports. If you continue to have problems, your printer cable may need replacing.
- If you are using a network printer, the network printer driver is not loaded. Check your AUTOEXEC.BAT file to make sure that it is loading the proper driver and reboot.

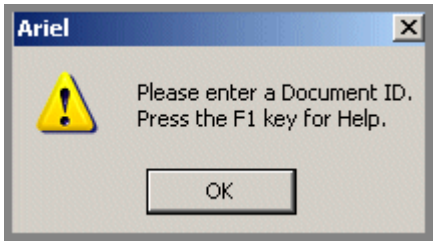
If you have not installed a printer on your system or not configured it to Ariel, you cannot view the set up options for the document for which a print out has to be taken. If you click **Print Setup**, an error message will be displayed prompting you to install the printer.


Ariel
Before you can perform printer-related tasks such as page setup or printing a document, you need to install a printer. Do you want to install a printer now?
Yes
No

Click **Yes** to install the printer.

Checking Document ID

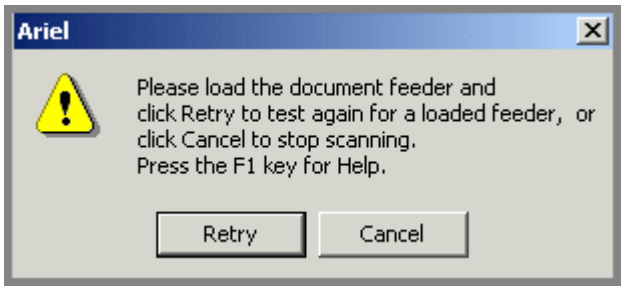
When you send documents to other Ariel workstations or patrons, save the document in the Archive Queue window, or modify the document details in the Archive Queue Entry, Send Queue Entry, Patron Delivery Queue Entry, and Received Queue Entry windows, you must specify the document ID in the Document ID field. If the document ID is not specified in these windows, an error message will be displayed prompting you to enter the document ID.



Click OK and enter the document ID in the respective window accordingly.]

Checking Document Feeder for Scanning Documents

To scan pages of a document, the required pages must be placed in the document feeder of the scanner. If the document pages are not placed or loaded in the feeder and if you try to scan the pages by selecting the **Auto Scan Mode** check box and click **Scan** in the Scan window, a message will prompt you to load the pages in the document feeder.


Ariel
Please load the document feeder and
click Retry to test again for a loaded feeder, or
click Cancel to stop scanning.
Press the F1 key for Help.
Retry
Cancel

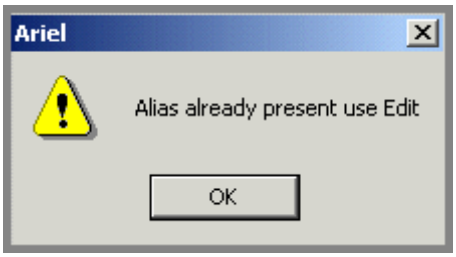
Check whether the document pages are placed or loaded in the document feeder to resume scanning.

Checking Alias Name in Add New Address Window

To add a new Ariel workstation address, you must specify the alias name in the Add New Address window. You can click **Add to Address Book** in the Send window to add the address of an Ariel workstation. If the alias name is not specified, an error message will be displayed prompting you to enter the alias name.

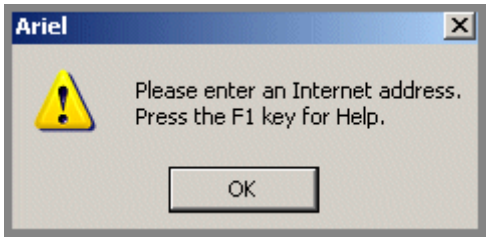
Click **OK** and enter the alias name in the Add New Address window.

If the alias name already exists in the address book, an error will be displayed that the alias already exists and you can click **Edit** to modify the alias details.



Checking Internet Protocol Address in Add New Address Window

To add the Internet Protocol address of an Ariel workstation, you must specify the Internet Protocol address of the Ariel workstation in the Add New Address window. If the Internet Protocol address is not specified, a message will be displayed prompting you to enter the Internet Protocol address of the Ariel workstation.



Click **OK** and enter the Internet Protocol address in the Add New Address window.

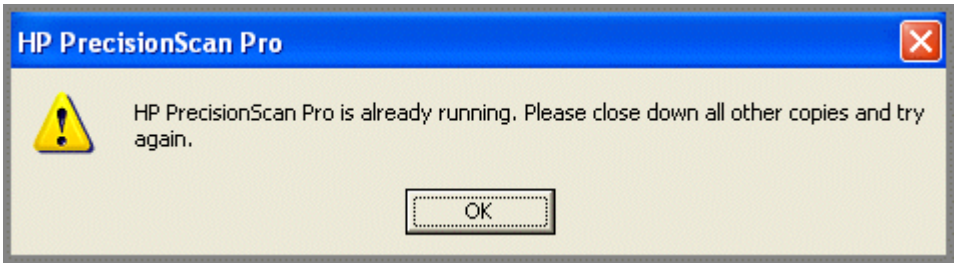
Checking Scanner Initialization

For scanning documents, the scanner driver and the scanner must be installed. After installing the scanner, you must initialize it. If the scanner is not initialized properly on your system, an appropriate error message will be displayed. The error messages can be displayed when:

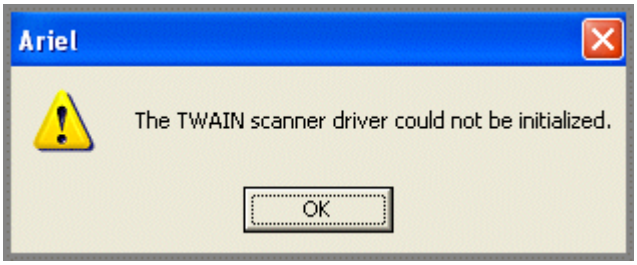
- You access the same scanner application used by Ariel and access Ariel simultaneously.
- The data or power cable is disconnected from the scanner or the system while scanning is in progress.

- The data or power cable is disconnected from the scanner or the system before scanning documents.

When you access the same scanner application used by Ariel and access Ariel simultaneously, a message will prompt you to restart the application as the copy of the scanner is already in use.

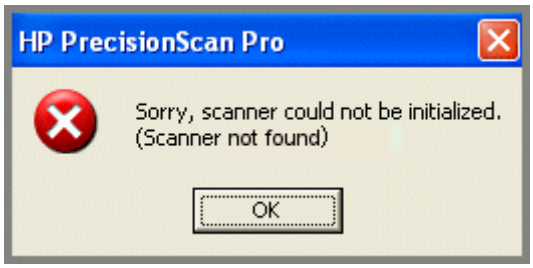


Click **OK**. A message that the twain scanner could not be initialized will be displayed.



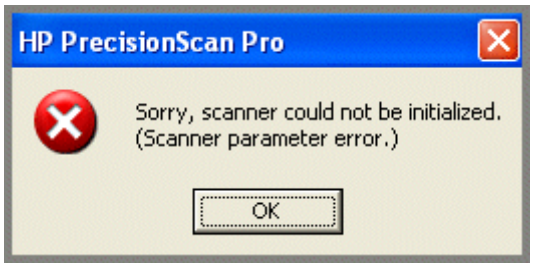
Click **OK**. You need to close the scanner being used and restart Ariel to initialize the scanner.

If the data or the power cable is disconnected from the scanner or the system when scanning is in progress, the preview of the scanned page will not be displayed and error message stating that the scanner is not initialized will be displayed.



Click **OK** and check if the power and the data cable are connected. If the power cable is disconnected, connect it and restart the scanner. If the data cable is disconnected, connect it and restart the scanner and Ariel.

When the data or the power cable is not connected before scanning the document, an error message stating that the scanner is not initialized will be displayed when you click **Scan** in the Scan window of Ariel.



Click **OK** and check if the power and the data cable are connected. Restart Ariel after you connect the power and data cable.

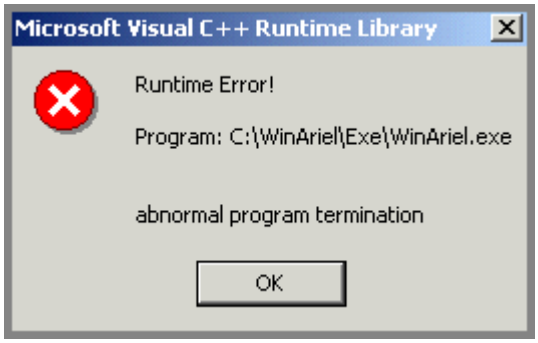
If you have selected an ISIS scanner and the ISIS scanner driver or the scanner is not installed on your system, an error message stating that the ISIS scanner is not initialized will be displayed.

Click **OK** and check if the ISIS scanner driver and the scanner is installed on your system.

Checking SQL Server Connection

You can perform all the network and document management tasks only when the SQL Server is connected to an Ariel workstation. When you try to access Ariel when the SQL Server is shut down an error message will be displayed.

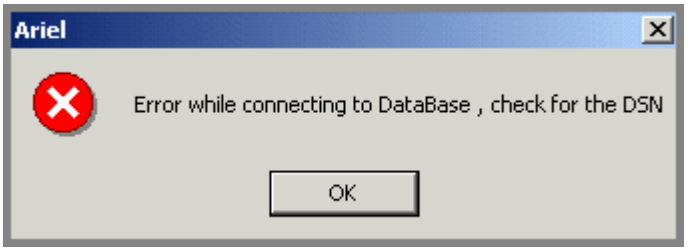
If the SQL Server is shut down when Ariel is being used, you will not be able to perform any network or document management task. A runtime error message will be displayed.



Click **OK**. The application will close. Start the SQL server to work with Ariel again.

Checking DSN Connection

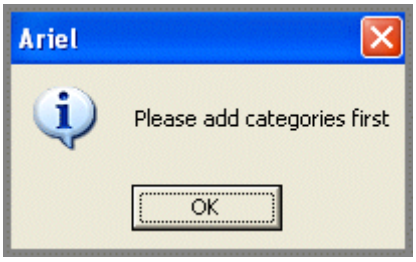
The user name and password specified in the winariel.ini file and the DSN must be same. If the password or the user name is different, a message will prompt you to check the DSN connection.



Click **OK** and check for the user name and password specified in the winariel.ini file.

Checking Patron Categories for Sending Documents to Patrons

In Ariel, you can specify a patron category and assign the list of patrons to it. You if have not set up any categories for the patrons, while sending documents to patrons, an error message will be displayed prompting you to add patron categories.



Click **OK** and enter the patron category details in the Patron Categories Details window.

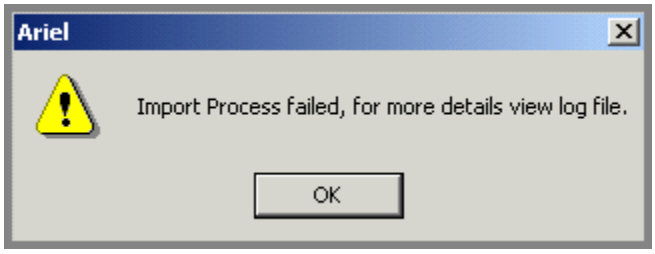
Validating Dates in Bibliographic Info Window

While entering the bibliographic details of a document, you need to specify the publication and the component publication date of the document in the Bibliographic Info window. The date can be selected from the Calendar look up or you can enter the date in the specific format. If the date specified is invalid, an error message will be displayed prompting you to enter a valid date.

Click **OK** and enter a valid date in the publication date and component publication date fields.

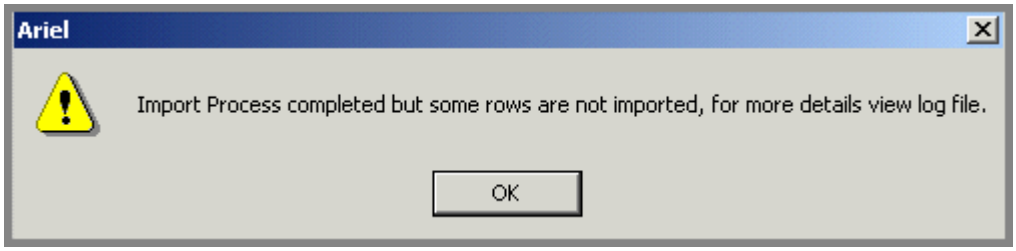
Checking for Imported Address Book and Patron List

You can import address details of Ariel workstations and patrons from documents that are in Excel or Comma Separated Values (CSV) format. In case of any error in the document format being imported, an error message will be displayed. For example, for importing the address book and patron list, you need to specify the details in a specific format. If the format is not clear or the file is corrupted, the address book or the patron list will not be imported and an error message will be displayed.



Click **OK**. you can check the log file for the errors and rectify the document for successfully importing the document.

In address book you cannot overwrite an existing alias detail. When existing alias details are imported, an error message will be displayed stating that some rows were not imported.

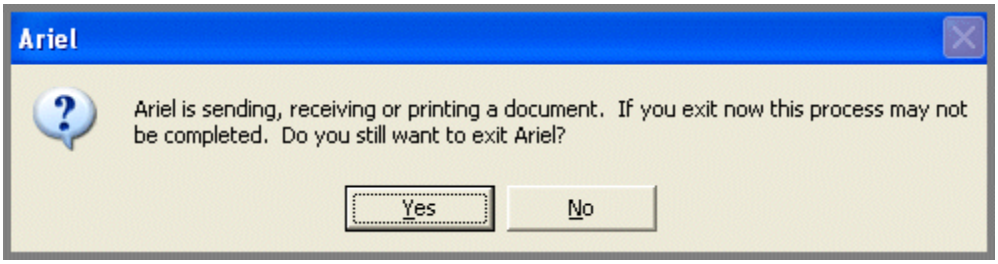


Click **OK** and check the log file for the details to rectify the error.

When existing patrons' names are imported, an error message will not be displayed and Ariel automatically creates another entry for it.

Logging Off while Working with Ariel

You can log off from Ariel by clicking or selecting **File → Exit**. If Ariel is sending, receiving, or printing documents it will display a message confirming your log off.


Ariel
Ariel is sending, receiving or printing a document. If you exit now this process may not be completed. Do you still want to exit Ariel?
Yes
No

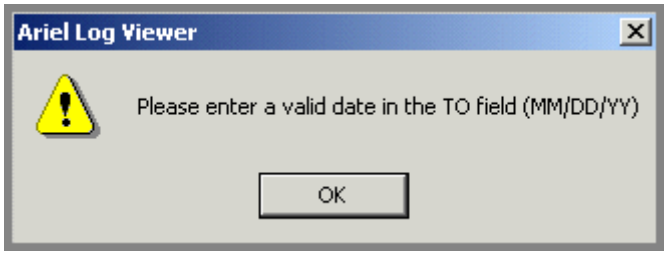
If you click **Yes**, the sending, receiving, and printing operations will be terminated and Ariel will shut down. Click **No** to continue working with Ariel.

Validating Dates in Log Files

In the Ariel Log Viewer window, you can use the filters option to view the log details of a specific document that is sent or received. You can specify date range in the From and To fields to view the document details within specific duration. If the date range is not selected in the From field of the Ariel Log Viewer window, an error message will be displayed prompting you to enter a valid date.

Click **OK** and specify the date range in the From field.

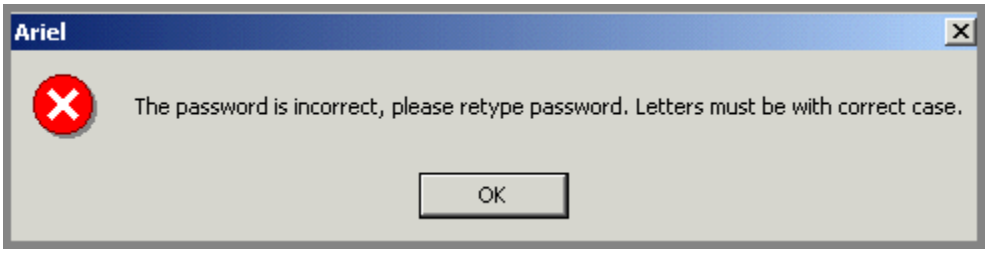
Similarly, if you do not specify the date range for the To field an error message will be displayed prompting you to enter a valid date.



Click **OK** and enter a valid date in the To field.

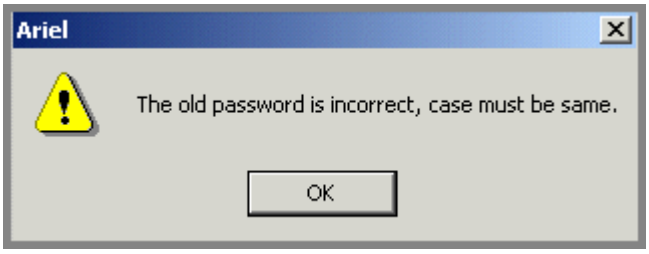
Checking the Passwords

A password is required to access the document counter feature of Ariel. The password in Ariel is case sensitive. If you enter a wrong password in the Password Confirmation window or change the case used for the password, an error message will be displayed prompting you to enter the correct password and case.



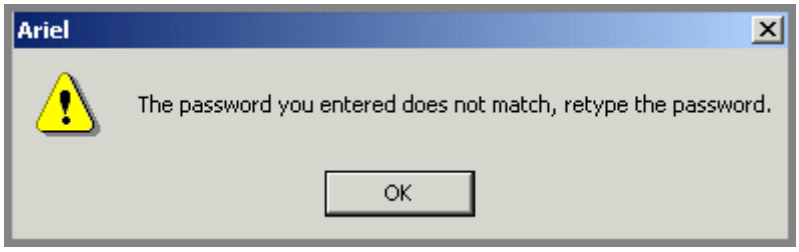
Click **OK** and specify the correct password again.

You can change you password through the Change Password window in Ariel. You must specify your current password in the Old Password field, else an error message will be displayed stating that the old password is incorrect and the case for the password must be checked.



Click **OK** and specify the old password again.

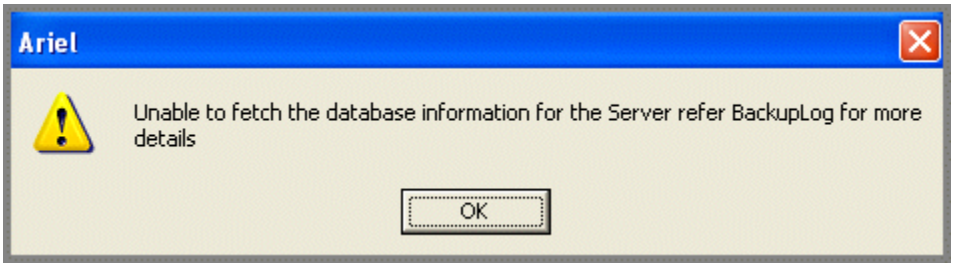
After entering your new password in the Change Password window, you have to specify the same new password in the Confirm Password field. If there is a mismatch in the password specified in the New Password and Confirm Password fields, an error message will be displayed prompting you to retype the password



Click **OK** and specify the new password in the Confirm Password field.

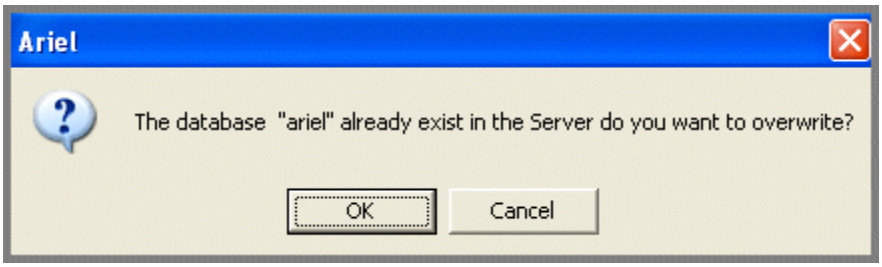
Checking the Database

In Ariel, it is advisable to take frequent backup of the database so that you can restore the database in case your system crashes. While taking a back up of any database, you must ensure that the database is available and the name specified is correct. Otherwise, an error message will be displayed stating that the database could not be located.



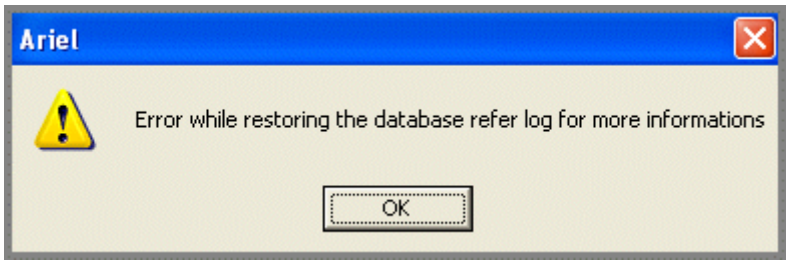
Click **OK** and check the log entries in the Ariel Log Viewer window to resolve the error.

While restoring, if you are specifying the same database name, an error message will be displayed that the database exists with the same name and whether you want to overwrite it.



Click **OK** to overwrite the database or click **Cancel** to cancel the restore process.

If there is a problem while restoring the database, an error message will be displayed.



Click **OK** and check the log entries in the Ariel Log Viewer window to resolve the error.

Validating Mail Servers

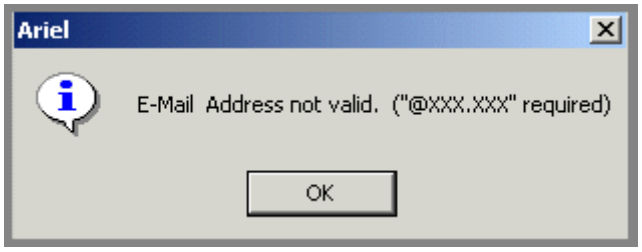
In Ariel, mail servers act as a gateway for incoming and outgoing mails. Mail servers are also important for the ‘store and forward’ and ‘store and retrieve’ options in Ariel. You can specify the mail server details in the various tabs of the Preferences window. For specifying the mail server details for the ‘store and forward’ and ‘store and retrieve’ options, it is necessary to specify a valid mail server Internet Protocol address or system name. If the Internet Protocol address or the system name is not valid or if

they are not specified, an error message will be displayed when you click **Apply** or **OK** in the Preferences window.

Click **OK** and specify a valid Internet Protocol address or the system name.

Validating Email Addresses

In Ariel you need to specify the email addresses to record the return email address, SMTP account name, incoming server account name, and patron details. If a valid email address is not specified, an error message will be displayed stating that the email address is not valid.



Click **OK** and specify a valid email address.

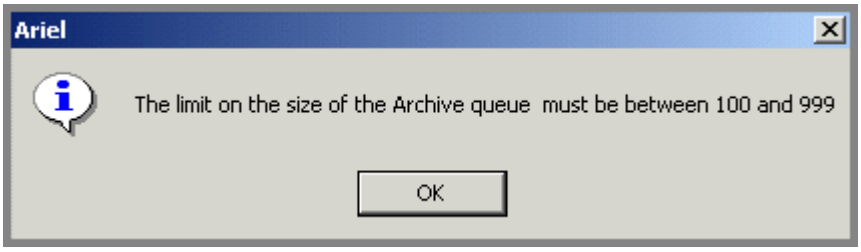
A valid email address consists of a name that identifies the user to the mail server, followed by an ‘at’ (@) sign and the host name and domain name of the mail server. For example, if Anne E. Oldhacker has an account on the machine called baz at Foo Enterprises, the email address of Anne E. Oldhacker can be ‘aeo@baz.foo.com’, which is pronounced as "A E O at baz dot foo dot com."

A valid email address cannot contain more than one ‘at’ (@) sign and also any other special character.

Checking Number of Documents

In Ariel, you can specify the number of documents that can be saved or held in the different Queue windows. You can also specify the time duration for checking for new mails, delete log files and documents from the server which are sent by email or saved in the store and retrieve server. To perform these document management tasks, the minimum and maximum duration in days, hours, minutes, or views must be specified. If the time duration is not specified or if it is less or more than the minimum and maximum range, an error message will be displayed prompting you to specify the duration within the range.

For example, you can specify the number of documents that can be saved in the Achieve Queue window by specifying the limits in the **General** tab of the Preferences window. If you have specified a limit of 80 for the Limit Documents to: (100-900) field in the Achieve section, an error will be displayed prompting you to specify the limits between 100 to 999.

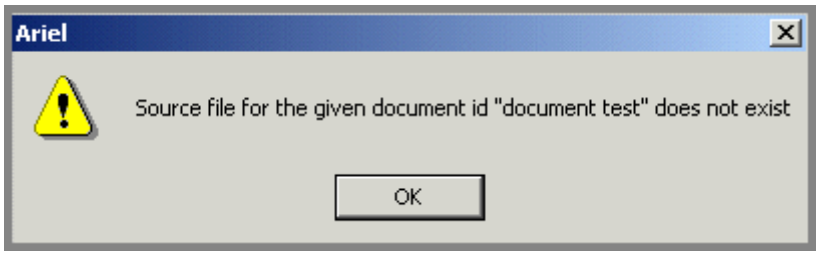


Click **OK** and specify the limit between 100 to 999 documents.

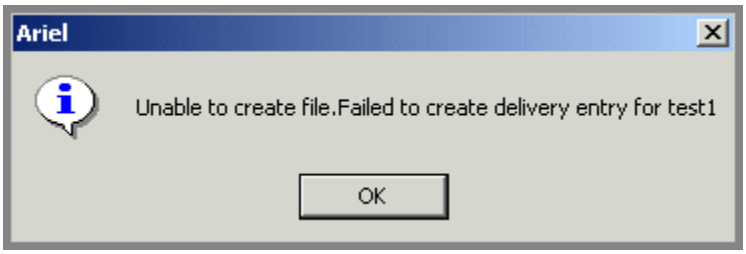
Checking Files in OUT, DELIVERY, and SAVED Folders

When you send documents to Ariel workstations or patrons or save documents in the Archive Queue window, the document details will be stored in the database and in the OUT, DELIVERY, and SAVED folders which are in your local drive. If any of the data file in these folders are deleted, you cannot send or save the document that is associated with the deleted data file. The details of the documents can still be viewed in Ariel in the respective Queue windows because the document details are stored in the database.

If the data file of a document in the OUT folder is deleted and you try to save a document from the Send Queue window, an error message stating that the source file for the given document does not exist will be displayed.

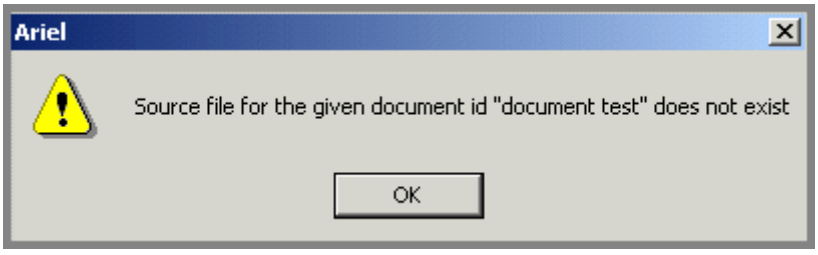


Similarly, when the data file of a document in the OUT folder is deleted and you try to send the document to a patron, an error message will be displayed stating that the delivery queue entry cannot be created in the Delivery Queue window.



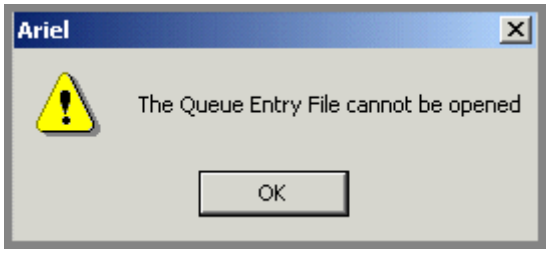
To avoid this, ensure that the data files in the OUT folder are not deleted.

If the data file of a document in the DELIVERY folder is deleted and you try to save a document from the Delivery Queue window, an error message stating that the source file for the given document does not exist will be displayed.



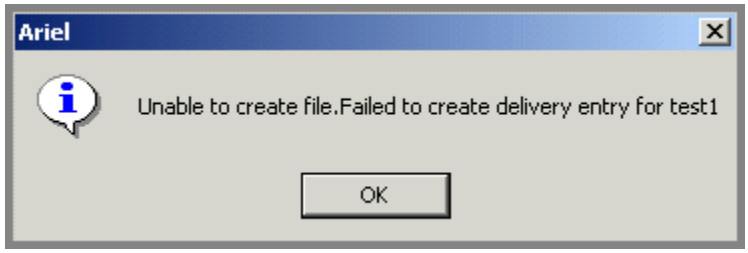
Similarly, when the data file of a document in the DELIVERY folder is deleted and you try to send the document to an Ariel workstation, an error

message will be displayed stating that the source file for the given document does not exist.

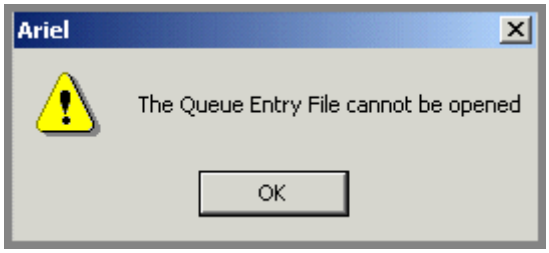


To avoid this, ensure that the data files in the DELIVERY folder are not deleted.

If the data file of a document in the SAVED folder is deleted and you try to send the document to a patron, an error message will be displayed stating that the delivery queue entry cannot be created in the Delivery Queue window.



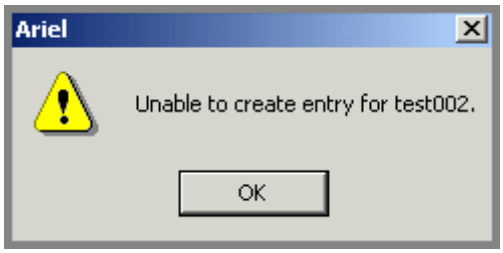
Similarly, when the data file of a document in the SAVED folder is deleted and you try to send the document to an Ariel workstation, an error message will be displayed stating that the source file for the given document does not exist.



To avoid this, ensure that the data files in the SAVED folder are not deleted.

If the data files of documents in the SAVED or DELIVERY folder are deleted and you try to send documents to the Ariel workstation, the Send

window will be displayed. On selecting the Ariel workstations, if you click **Send**, an error message will be displayed stating that the entry for the documents could not be created.



Chapter 3. Setting Up Ariel

Setting up Ariel provides information about configuring the various options required for working with Ariel. It also provides information about creating and maintaining address details that are required to start working in Ariel.

Before you start using Ariel, you need to set up scan, mail, patron delivery, store forward and store retrieve, send and receive, printing, firewall, and general options for performing various tasks using the application.

This chapter provides conceptual and procedural information for setting up these options and creating and maintaining addresses in Ariel. It consists of the following sections:

- Overview
- Configuring Ariel
- Managing the Address Book
- Managing Patron Details
- Managing Document Count

Overview

The Setup feature of Ariel enables you to configure the application in line with your document maintenance process. You can start using Ariel only after the setup is completed. While setting up Ariel, you can specify or modify your preferences and options.

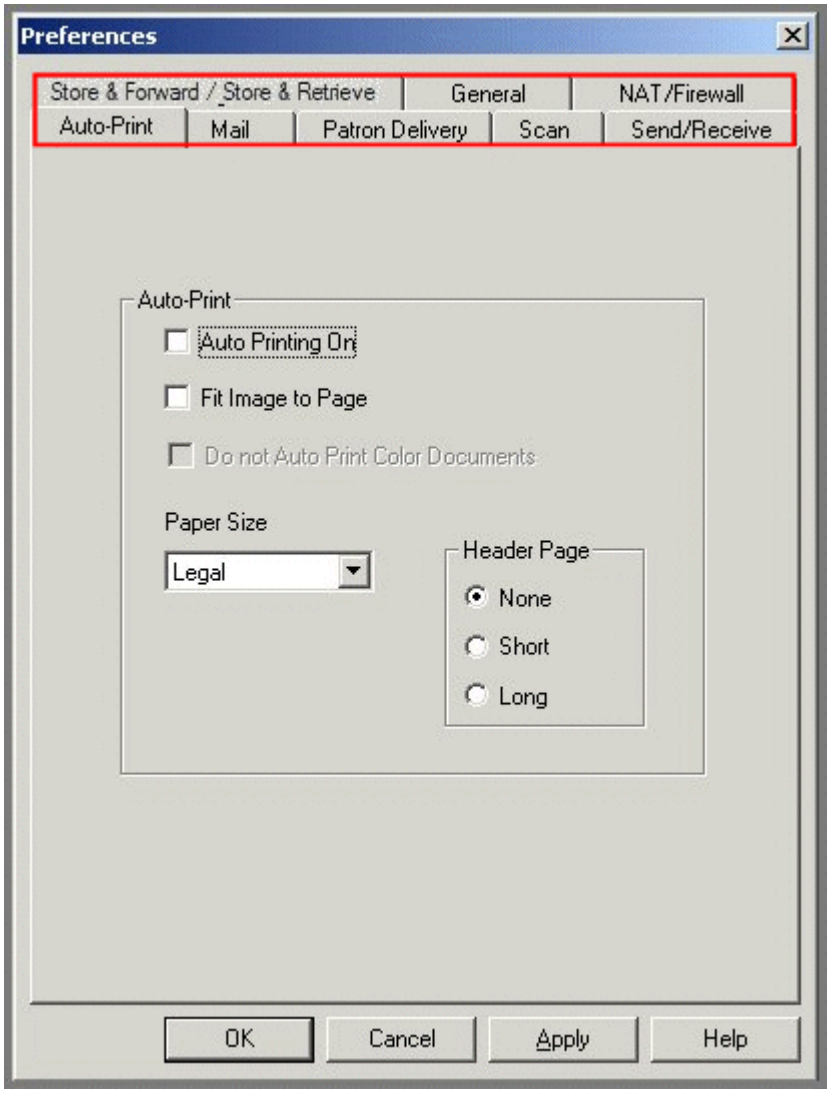
Ariel can be used to send documents to Ariel workstations as well as patrons. Ariel workstations are those systems that have Ariel installed on them. Patrons are external clients who do not have Ariel installed on their system but can receive documents from Ariel workstations. Documents are sent to patrons through FTP or email.

Using the Setup feature you can specify the scan, print, store and forward and store and retrieve, send and receive, mail, patron delivery, firewall, and general options. In addition, you can set up the mail addresses of the Ariel workstations and patrons. These details are useful for sending and receiving documents from Ariel workstations and patrons.

Configuring Ariel

Before using Ariel, you need to configure various setup options to enable the application to work according to your requirements. These options are called ‘preferences’ in Ariel.

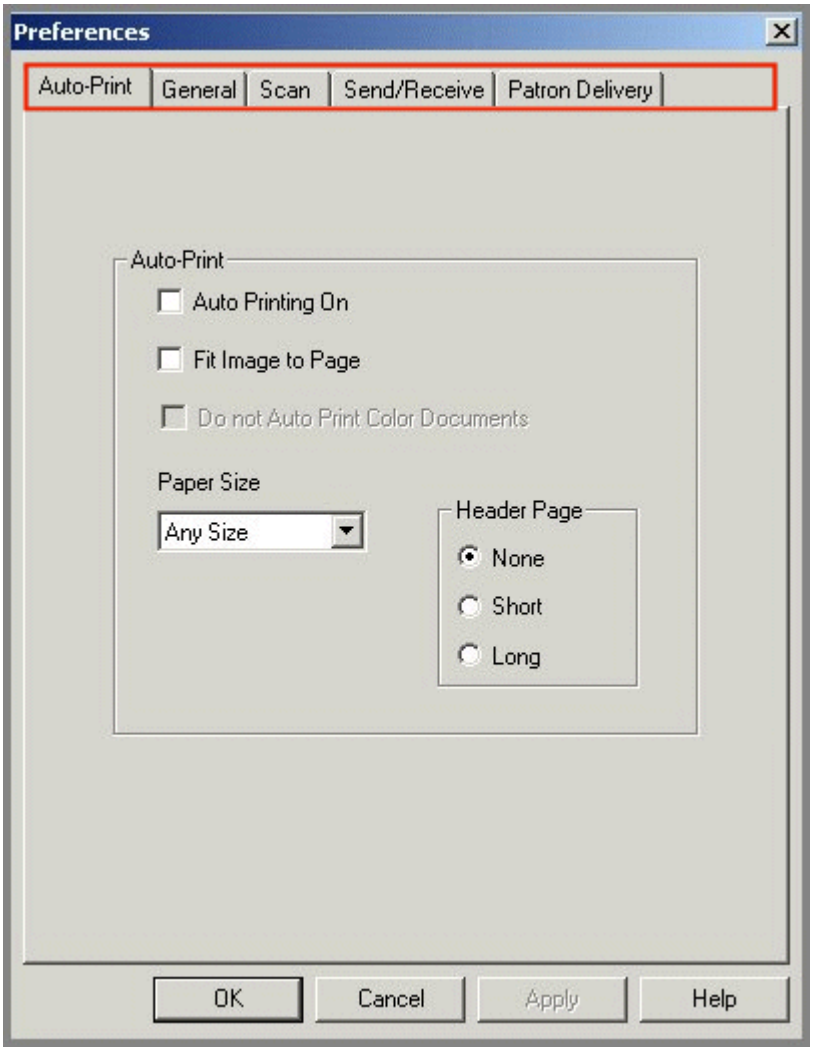
You can set up the required preferences by clicking the respective tabs in the Preferences window. The Preferences window of Ariel can be accessed through the **Settings** menu. The various tabs available in the Preferences window are NAT/ Firewall, Scan, Auto-Print, Mail, Patron Delivery, Store & Forward / Store & Retrieve, Send/Receive, and General.



Preferences can be set up at the application level and window level. The settings saved in the Preferences window of Ariel are called application level settings. You can temporarily enable or disable such settings based on your requirements in the windows. Such temporary changes are called window level changes. These changes are not saved when you close the application. On restarting the application, the settings will be displayed according to the options set up in the Preferences window.

The settings for window level changes include enabling or disabling the option of sending documents to Ariel workstations, delivering documents to patrons, receiving documents from Ariel workstations, and auto printing of documents. The window level changes can be selected using the **Settings** menu of Ariel. For example, you can enable or disable the auto print option to print or suspend printing of documents automatically after they are received.

Ariel can be set up to run as a server or client. In the server mode, you can perform all the document management and network related activities such as sending and receiving documents. In a client set up, you can only perform document management activities such as scanning, printing, deleting, and saving documents. In the client mode, the tabs available in the Preferences window are General, Auto-Print, Scan, Send/Receive and Patron Delivery.



While in the client mode, you cannot set up preferences in the session level for the sending, receiving, and delivering options. You can only set up session level preferences for auto-printing documents.

This section provides procedural and task related information for setting up preferences for working with Ariel and consists of the following sections:

- Setting Up General Options
- Configuring Firewall Options
- Setting Up Scan Options
- Setting Up Auto Print Options
- Setting Up Mail Options
- Setting Up Patron Delivery Options
- Setting Up Store Forward and Store Retrieve Options
- Setting Up Send and Receive Options

Setting Up General Options

General options refer to the general details, which you can set up to be used throughout the application. For example, you can specify the date format that can be used in your application.

In Ariel, you can set up the general options required for working with Ariel. You can specify the sender's name, date format, and the number of documents that can be saved in the Archive Queue window. In addition, you can specify the copyright details of the document sent to the Ariel workstations or patrons. These details are useful to identify and track the documents that are sent or received from Ariel workstations or patrons.

The Sender Name field in the **General** tab refers to the name of the person or institution sending the document from the Ariel workstation.

You can use the **General** tab of the Preferences window to set up the general options.

Field Descriptions

The fields in the **General** tab of the Preferences window are described in the following table:

Field Name	Field Description
Sender Name	
Sender Name	The name of the person or institution sending the document from an Ariel workstation. The sender's name will be displayed in the From field of the Received window.
Date Format	
Date Format	The format used for entering the date in the application. You can select the desired option. The available options are DD/MM/YYYY, MM/DD/YYYY, YYYY/MM/DD.
Archive	
Limit Documents to (100 - 999)	The maximum number of documents that can be saved in the Archive Queue window. The limit for the documents that can be saved in the Achieve Queue window can be between 100 to 999. This is a mandatory field. Note: Only numeric values and a maximum of three digits can be entered in this field.
Copy-Right	
Copyright Notice	The copyright notice of your company or institution.

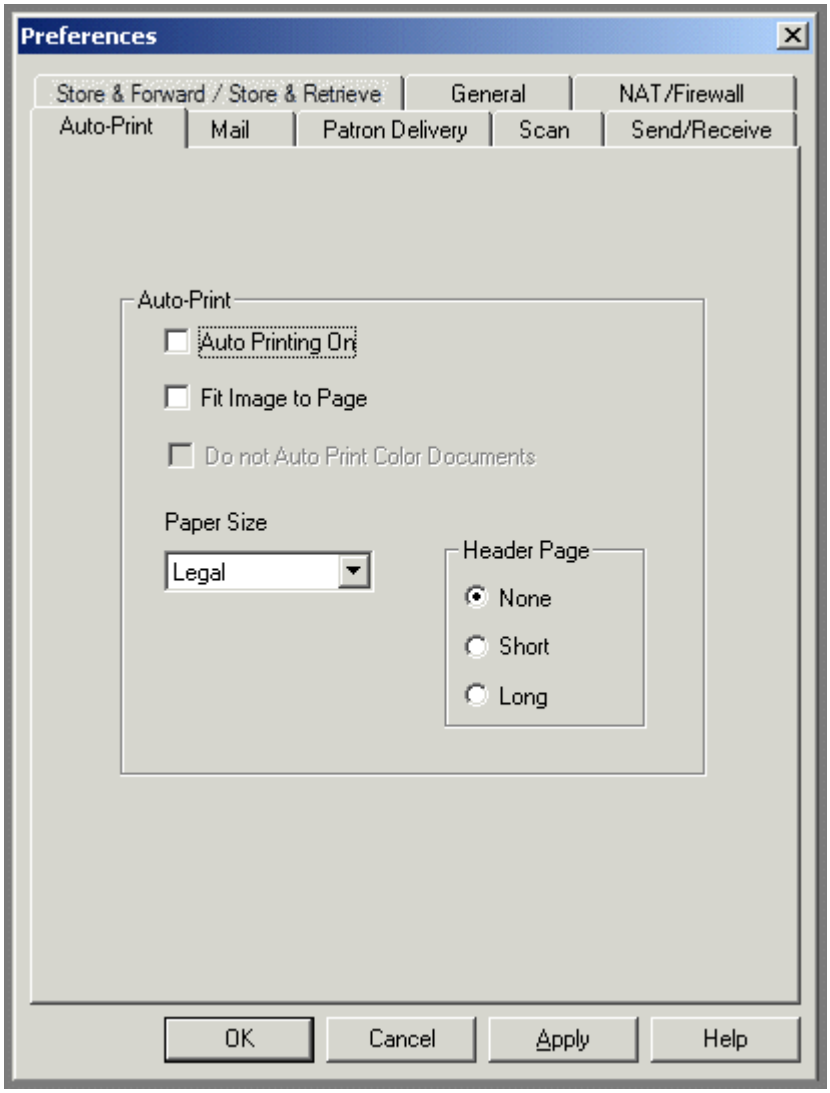
Step by Step

You can enter and modify general preferences using the **General** tab of the Preferences window.

Accessing the Preferences Window

To access the Preferences window:

Step 1. Select **Settings → Preferences.** The Preferences window is displayed.



Step 2. Set up the preferences as required.

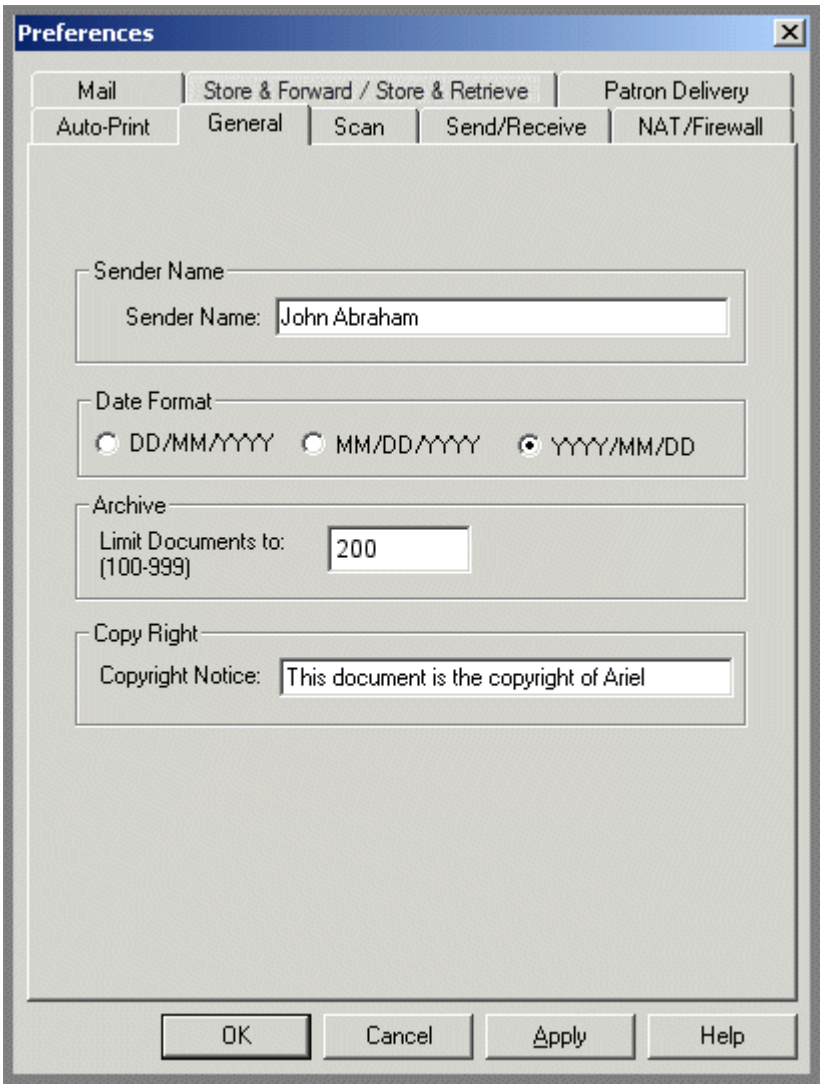
*1. By default, the **Auto-Print** tab will be selected when you access the Preferences window.*

*2. You can navigate through the various tabs in the Preferences window using the **Control** and **Tab** key on the keyboard.*

Entering General Preferences

To enter the general preferences:

Step 1. Select the **General** tab in the Preferences window. The fields for entering the general preferences details are displayed.



Step 2. Enter the sender's name, date format, number of documents that can be saved in the Archive Queue window, and the copyright details.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

1. You can view the preference details by accessing the Preferences window.

2. The Sender Name field will be disabled when the application is in the client mode.

*3. You can also click **OK** before clicking **Apply** to save and exit from the Preference window.*

Modifying General Preferences

To modify the general preferences:

Step 1. Select the **General** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to update the changes as default preferences.

Step 4. Click **OK** to close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

*Once you apply the preference options, the changes will be applied in the application level. On clicking **Cancel**, you cannot undo the changes.*

Configuring Firewall Options

A firewall is a security system intended to protect a network against external threats coming from another network such as the Internet. A firewall prevents computers in the network from communicating directly with computers external to the network and vice versa.

You can configure the firewall settings based on your requirements through the Network Address Translation (NAT) by specifying the Internet Protocol address of the system where the firewall has been installed. All the documents received or sent would be screened in this system.

The Internet Protocol (IP) address specifies the address of the server from where information stored can be retrieved by a specific system and messages can be stored for forwarding it to the patrons and Ariel workstations.

Network Address Translation is an Internet standard that enables a Local-Area Network (LAN) to use one set of Internet Protocol addresses for internal traffic and a second set of addresses for external traffic. A NAT box is located where the LAN connects to the Internet and makes all necessary Internet Protocol address translations.

NAT serves three main purposes:

- Provides a type of firewall by hiding internal Internet Protocol addresses.
- Enables an organization to use more internal Internet Protocol addresses. Since the internal Internet Protocol addresses are hidden, an organization can use any number of Internet Protocol addresses without the possibility of conflict with the addresses used by other companies or organizations.
- Allows a company to combine multiple Integrated Services Digital Network (ISDN) connections into a single Internet connection.

*The **NAT/Firewall** tab will not be displayed in the Preferences window when the application is in the client mode.*

You can use the **NAT/Firewall** tab of the Preferences window to configure the firewall options.

Field Descriptions

The fields in the **NAT/Firewall** tab of the Preferences window are described in the following table:

Field Name	Field Description
Firewall	
Use Net Addressing Translation	Select this check box to use Net Address Translation (NAT) for connecting the system to the server where the firewall is installed. Network Address Translation is an Internet standard that enables a local-area network (LAN) to use one set of Internet Protocol addresses for internal traffic and a second set of addresses for external traffic. A NAT box is located where the LAN meets the Internet and makes all the necessary Internet Protocol address translations.
External IP address	The Internet Protocol address of the system where the firewall is installed. This field will be enabled only if the **Use Net Addressing Translation** check box is selected.

Step by Step

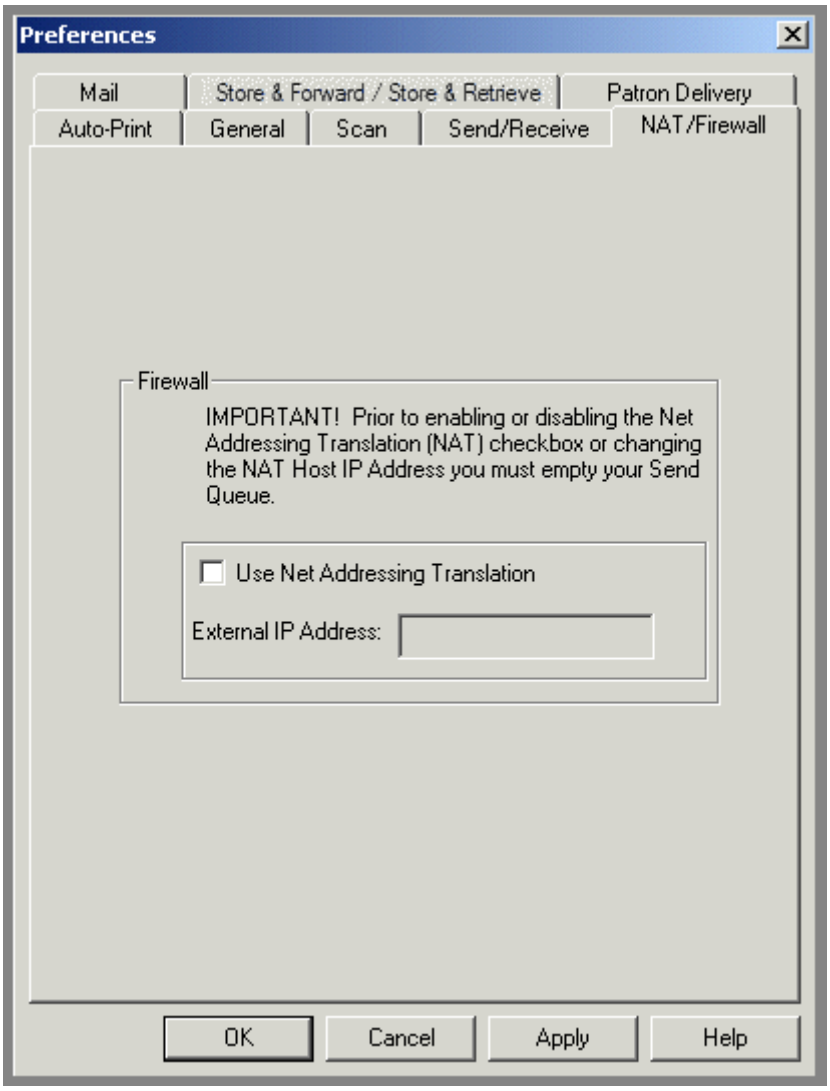
You can enter and modify firewall options using the **NAT/Firewall** tab of the Preferences window.

Entering Firewall Options

To enter the firewall options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **NAT/Firewall** tab in the Preferences window. The fields for entering the firewall details are displayed.



Step 3. Select the **Use Net Addressing Translation** check box. The External Internet Protocol Address field is enabled.

Step 4. Specify the Internet Protocol address of the system where the firewall has been installed in the External Internet Protocol Address field.

Step 5. Click **Apply** to save the changes as default preferences.

Step 6. Click **OK** to save and close the Preferences window.

Step 7. You can also click **Cancel** or to close the Preferences window without saving the details.

Modifying Firewall Options

To modify general preferences:

Step 1. Select the **NAT/Firewall** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to update the changes and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

Setting Up Scan Options

Scan options refers to setting up different preferences for scanning a document in Ariel. For example, you can specify the scanner, which will be used for scanning documents.

In Ariel, you need to configure a scanner and set up the scan options for scanning documents to send them to Ariel workstations or patrons. The quality of the scanned pages will depend on the scan options selected. The documents scanned can be saved in the TIFF format.

Before you set the scan options, you need to select the scanner settings. You can specify the brightness, contrast, resolution, dither, format, paper size, and transmission speed settings. In addition, you can select the disposition options to scan and send documents to Ariel workstations or patrons, or save them in the Archive Queue window. When the documents are sent to an Ariel workstation after scanning, the document details are displayed in the Send Queue window. When it is sent to a patron, it is displayed in the Delivery Queue window and when saved, it is displayed in the Archive Queue window.

Scanners can be configured in a system with the help of scanner drivers. Different scanners drivers support different types of scanners. You can select the TWAIN or Image Scanner Interface Specific (ISIS) scanner driver. When you select the ISIS scanner driver, the list of scanners supported by **ISIS** will be automatically displayed. You can select a scanner from the list and also select the different properties for scanning the documents. You can also set up advanced scanner settings by clicking '**More**' in the **Scan** tab.

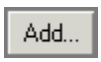
In the scan settings, you can specify the type of scanner dialog that will be displayed for scanning documents. Each type of scanner has a dialog that displays options based on the features available in the scanner. In Ariel, you can select the Ariel scan dialog or the scanner specific dialog as the default dialog for scanning documents. For example, if an Epson scanner is configured in your system, you can select the scan dialog specific to the Epson scanner. This scanner dialog will be displayed when you want to scan documents.

You can use the **Scan** tab of the Preferences window to set up the scan options.

The command buttons in the **Scan** tab of the Preferences window are described in the following table:

Button	Used to
	Select the Twain scanner type for scanning documents. The Select Source window will be displayed from which you can select the required scanner.
	Set up the scanner driver settings before scanning the page. For more information, see "Setting Up Advanced Scanner Settings"

The command buttons in the Scanner Selection window are described in the following table.

Button	Used to
	To add a new scanner driver.

Button	Used to
Setup...	To set up the scanner settings. When you click this button, you can specify the required scanner settings. The scanner settings options specific to the scanner selected in the Select Scanner window will be displayed.

Field Descriptions

The fields in the **Scan** tab of the Preferences window are described in the following table:

Field Name	Field Description
Scan Settings	The types of scan dialog that will be displayed for selecting the scanner. You can select the required scan dialog option. The available options are: 1. Ariel's scan dialog: Selecting this option will display only the scan dialog box specific to Ariel. 2. Scanner-specific dialog: Selecting this option will display the scan dialog of the scanner configured to the system.
Dither	The dither type for an image. You can select the required option from the drop-down list. Note: The values displayed in the drop-down list are based on the scanner selected.
Paper Size	The size of the paper that will be used for scanning documents. You can select the required option from the drop-down list. Note: The values displayed in the drop-down list are based on the scanner selected.

Field Name	Field Description
Brightness	The extent of brightness used while scanning the document. You can use the horizontal scroll bar to adjust the brightness as required. This field will be enabled or disabled based on the scanner selected.
Resolution	The resolution that will be used when the documents are scanned. You can select a required option. Note: The values displayed in the drop-down list are based on the scanner selected.
Contrast	The extent of contrast used while scanning documents. You can use the horizontal scroll bar to adjust the contrast as required. This field will be enabled or disabled based on the scanner selected.
Format	The color format used for scanning a document. You can select a required format from the drop-down list. Note: The values displayed in the drop-down list are based on the scanner selected.
Auto Scan Mode	Select this check box to automatically scan all the pages of a document in an automatic document feeder. After the last page is scanned, the application automatically sends or saves the document, depending on the disposition you have selected.
Preview	Select this check box to view the recently scanned page in the document. Note: This check box will be displayed only if the **Auto Scan Mode** check box is selected.

Field Name	Field Description
Quality / Transmission Speed	Specifies the quality of the scanned document with respect to the file size and transmission speed. You can select the required option. The options available are: 1. Highest Quality / Slowest Speed: When this option is selected, the document quality will be high, the scanning speed will be slow, and the document size will be larger. 2. Medium Quality / Medium Speed: When this option is selected, the document quality, scanning speed, and the document size will be medium. 3. Minimum Quality / Fastest Speed: When this option is selected, the document quality will be lower, the scanning speed will be faster, and the document size will be smaller.

Field Name	Field Description
Disposition	The mode used for sending or saving the scanned documents. You can select a required option. The available options are: 1. Scan and Send: Selecting this option will scan and send a document to another Ariel workstation. The Send window will be displayed. You can select the name of the Ariel workstation or the Internet Protocol address as the destination. The details of the document sent will be displayed in the Send Queue window. 2. Scan and Save: Selecting this option will scan and save the document in the Archive Queue window. The Save window will be displayed. You can specify the document ID and file name to save the document. The document is saved and the details will be displayed in the Archive Queue window. 3. Scan and Send to Patron: Selecting this option will scan and send the document to a specific patron. The Send to Patron window will be displayed. You can select the patron category and email address and specify the document ID to send it to a patron. The details of the document will be displayed in the Delivery Queue window.

Field Name	Field Description
Scanner Driver	The scanner drivers used for configuring and selecting a scanner. You can select the required scanner option. The options available are: 1. TWAIN: When you select TWAIN, you can select the scanner from the list of scanners displayed in the Select Source window. 2. ISIS: When you select ISIS, the Select Scanner window is displayed with the list of scanners supported by the ISIS driver. You can select the required scanner. You can also add a new scanner to the list.

The fields in the Select Source window are described in the following table.

Field Name	Field Description
Sources	Lists the different scanners configured to the system. The list of scanners will be automatically displayed when this window is accessed.

The fields in the Scanner Selection window are described in the following table. This window will be displayed when you select the **ISIS** option in the Scanner Driver field in the **Scan** tab of the Preferences window.

Field Name	Field Description
Scanner	Lists the names of different scanners configured to the system. The list of scanners will be automatically displayed when this window is accessed.

Before You Begin

Before you set up preference options for scanning, the scanners must be configured in your system.

Step by Step

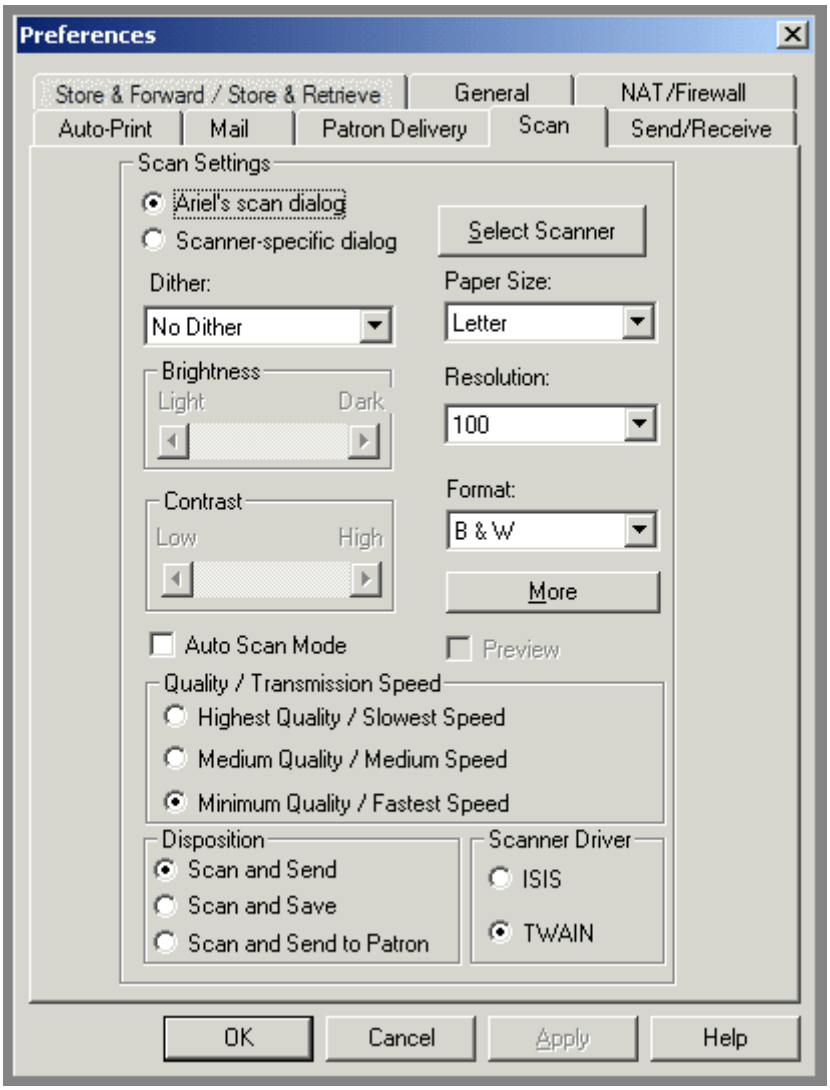
You can enter and modify scan options using the **Scan** tab of the Preferences window. You can select a specific TWAIN supported scanner from the Select Source window. You can also select and add a specific ISIS supported scanner using the Scanner Selection window.

Entering Scan Options

To enter the scan options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Scan** tab in the Preferences window. The fields for entering the scan options are displayed.



Step 3. Select the scan dialog, dither, paper size, brightness, resolution, contrast, format, auto scan mode, preview, quality / transmission speed, disposition, and scanner driver options from the respective fields.

Step 4. Click **Apply** to save the options as default preferences.

Step 5. Click **OK** to save and close the Preferences window.

Step 6. You can also click **Cancel** or to close the Preferences window without saving the details.

Modifying Scan Options

To modify scan options:

Step 1. Select the **Scan** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

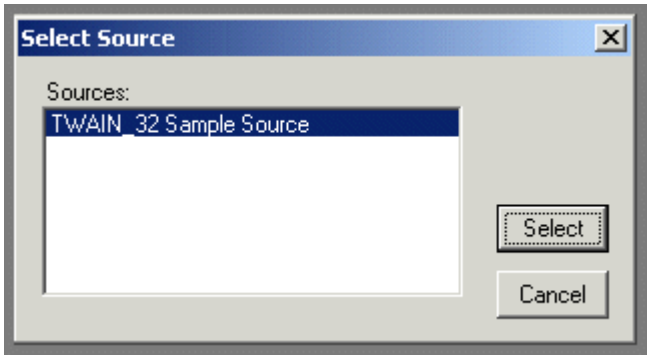
Selecting the TWAIN Scanner

To select the scanner:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Scan** tab in the Preferences window.

Step 3. Click **Select Scanner.** The Select Source window is displayed.



Step 4. In the Sources field, select the name of the scanner.

Step 5. Click **Select** to select the scanner as the default scanner for scanning documents.

Step 6. You can also click **Cancel** to cancel selection.

The list of TWAIN scanners that are installed on your system will be displayed in the Sources section.

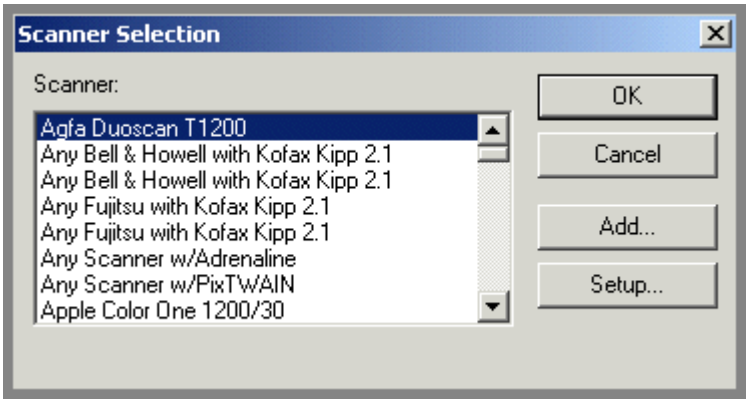
Selecting the ISIS Scanner

To select the ISIS scanner:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Scan** tab in the Preferences window.

Step 3. Select the **ISIS** option in the Scanner Driver field. The Scanner Selection window is displayed. You can also access this window by selecting the **ISIS** option and clicking **Select Scanner**.



Step 4. In the Scanner field, select the specific scanner driver.

Step 5. Click **OK** to select the scanner name as the default scanner for scanning documents.

Step 6. You can also click **Cancel** to cancel selection.

The list of ISIS scanners that are installed on your system will be displayed in the Scanner section.

Adding an ISIS Scanner

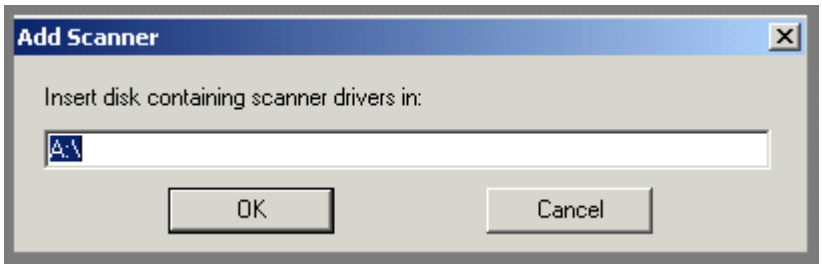
To add new ISIS supported scanner:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Scan** tab in the Preferences window.

Step 3. Select the **ISIS** option in the Scanner Driver field. The Scanner Selection window is displayed.

Step 4. Click **Add**. The Add Scanner window is displayed.



Step 5. Specify the relevant disk or drive containing the scanner driver.

Step 6. Click **OK** to add the scanner driver and close the Add Scanner window.

Step 7. You can also click **Cancel** to close the window without saving the details.

Setting Up Auto Print Options

Auto printing is an option available in Ariel by which you can automatically print a document on receiving it. By setting up auto print options, you can print documents immediately when they are received in the Received Queue window. The auto-print option is useful for Ariel workstations that receive large number of documents that need to be delivered as hard copies.

In Ariel, you can use the auto print options to set the default printing options for printing documents. You can specify the format of the document to be printed, paper size, and the size of the header page. You can set up the auto print options based on your requirements.

You can use the **Auto-Print** tab of the Preferences window to set up the auto print options.

Field Descriptions

The fields in the **Auto-Print** tab of the Preferences window are described in the following table:

Field Name	Field Description
Auto Printing On	Select this check box to automatically print all the pages of a document.
Fit Image to Page	Select this check box to automatically adjust the image to fit the selected paper size.
Do not Auto Print Color Documents	Select this check box to print only the grayscale and black and white documents. The color documents will not be printed when this check box is selected. Note: This check box will be enabled only if the **Auto Printing On** check box is selected.
Paper Size	The size of the paper for printing received documents. Only documents whose paper size match with the options selected in this field will be printed. You can select the required option from the drop-down list. The options available are Letter, Legal, A4, Ledger (11x17), A3, and Any Size.

Field Name	Field Description
Header Page	The size of the header page. You can select the required option. The options available are: 1. None: When this option is selected, no header page will be printed. 2. Short: When this option is selected, only a single header sheet showing document ID, patron name, note and copyright text, pages, time printed, and sender's name will be printed. 3. Long: When this option is selected, all Group of Electronic Document Interchange (GEDI) header fields will be printed on two or more header sheets.

Step by Step

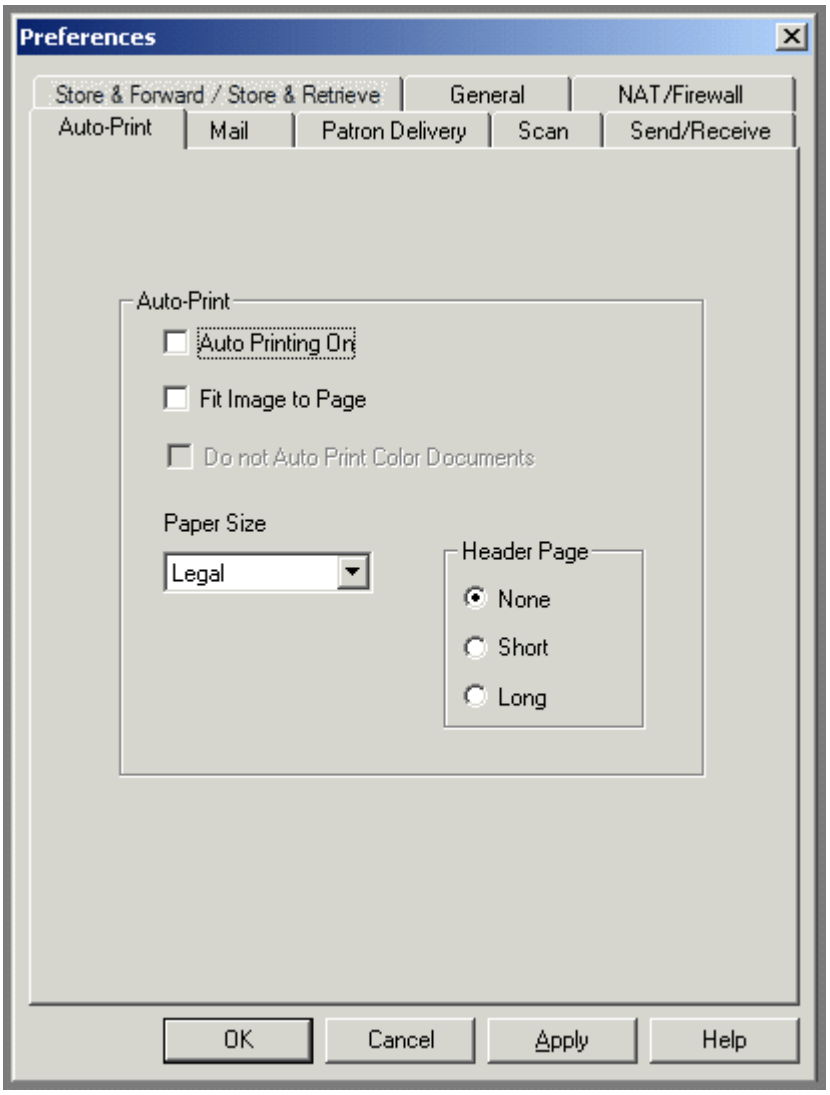
You can enter and modify auto print options using the **Auto Print** tab of the Preferences window.

Entering Auto Print Options

To enter the auto print options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Auto-Print** tab in the Preferences window. The fields for entering the auto print options are displayed.



Step 3. Select the auto print, paper size, and header page size options.

Step 4. Click **Apply** to save the options as default preferences.

Step 5. Click **OK** to save and close the Preferences window.

Step 6. You can also click **Cancel** or to close the Preferences window without saving the details.

*When the auto printing option is selected at the application level, the Auto-print option in the **Settings** menu will be automatically selected. A tick mark is displayed before this option in the **Settings** menu. You can suspend automatic printing of documents temporarily by selecting this option again in the **Settings** menu. The tick mark will disappear and auto printing of documents will be suspended.*

Modifying Auto Print Options

To modify auto print options:

Step 1. Select the **Auto-Print** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

Setting Up Mail Options

Mail options refer to the various options set up to receive and send emails to patrons. You can specify the SMTP port, Internet Protocol address, and the account name with the password to enable sending and receiving emails. All emails sent or received will be routed through the email server you specify.

In Ariel, you can set up the outgoing and the incoming mail server settings. You can also specify the time duration for checking new emails and delete or hold documents whose status is 'Pending' in the respective Queue windows. You can set up the mail options based on your requirements.

When you set up the outgoing mail server options, you need to specify the Simple Mail Transfer Protocol (SMTP) port, the Internet Protocol address or DNS name of the outgoing mail server, SMTP account name, and the password. SMTP port is a Transmission Control Protocol/Internet Protocol (TCP/IP) for sending messages from one computer to another on a network.

To enable incoming mails, you can specify the mail type, the port, Internet Protocol address of the mail server, and account name with the password. Incoming mail can either be received in the Internet Message Access Protocol (IMAP) or the Post Office Protocol 3. (POP3) format.

*The **Mail** tab will not be displayed in the Preferences window when the application is in the client mode.*

You can use the **Mail** tab of the Preferences window to set up the mail options. You can select the required options for sending and receiving mails. Based on the option selected you can either send and receive mails.

Field Descriptions

The fields in the Mail tab of the Preferences window are described in the following table:

Field Name	Field Description
Outgoing mail settings	
Enable outgoing mail	Select this check box to enable sending mails. When you clear this checkbox, you will not be able to send mails. A message will be displayed stating that IMAP/POP will be disabled. If you click **Yes**, the fields in the Outgoing mail settings and Incoming mail settings sections will be disabled. In addition the fields such as E-Mail Return Address and Check for new mail every minute will also be disabled. If you click **No**, you will be able to send and receive mails. Note: On selecting this checkbox, the Incoming mail settings will not be selected. You need to select the **Enable Incoming mail** checkbox to receive mails.
SMTP Port	The number assigned to the SMTP port for the outgoing mail server. This is a mandatory field. Note: Only numeric values can be entered in this field.

Field Name	Field Description
Outgoing mail server	The Internet Protocol address of the outgoing mail server. You can also specify the system name for the outgoing mail server. The Internet Protocol address of the specified system will be automatically displayed when you click **Apply**. This is a mandatory field.
SMTP account name	The name of the email account using which emails will be sent. This is a mandatory field.
SMTP account password	The password for the account name in SMTP Account Name above.
Incoming mail settings	
Enable incoming mail	Select this check box to enable incoming emails. When this checkbox is selected, you can receive mails. The **Enable outgoing mail** checkbox will be automatically selected. When you clear this checkbox, you will not be able to receive and send mails. A message will be displayed stating that IMAP/POP will be disabled. If you click **Yes**, the fields in the Outgoing mail settings and Incoming mail settings sections will be disabled. In addition the fields such as E-Mail Return Address and Check for new mail every minute will also be disabled. If you click **No**, you will be able to receive and send mails. Note: If you clear the **Enable incoming mail** checkbox, the outgoing mails settings will also get disabled.

Field Name	Field Description
Incoming mail type	The mail type used for receiving emails. For example, you can use any POP 3 account to receive emails. You can select the required option from the drop-down list. The available options are IMAP and POP3. This field will be enabled only when **Enable Incoming Mail** check box is selected.
Port	The number assigned to the POP3 port for the incoming mail server. This field will be enabled only when **Enable Incoming Mail** check box is selected. This is a mandatory field. Note: Only numeric values can be entered in this field.
Incoming mail server	The Internet Protocol address of the incoming mail server. You can also specify the system name of the incoming mail server. The Internet Protocol address of the specified system will be automatically displayed when you click **Apply.** This field will be enabled only when **Enable Incoming Mail** check box is selected. This is a mandatory field.

Field Name	Field Description
Account name	The dedicated Ariel email account from which Ariel documents can be retrieved. This field will be enabled only when **Enable Incoming Mail** check box is selected. This is a mandatory field.
Account password	The password assigned to the account name. This field will be enabled only when **Enable Incoming Mail** check box is selected.
E-Mail Return Address	The email address that will be displayed upon a REPLY action to a received email from Ariel. This is a mandatory field.
Check for new mail every	The time duration specified for checking new mails. The time duration for checking new mails can be between 1 to 999 minutes. This field will be enabled only when **Enable Incoming Mail** check box is selected. This is a mandatory field. Note: Only numeric values and a maximum of three digits can be entered in this field.

Field Name	Field Description
Delete or hold 'Pending' documents after	The time duration after which the documents will be deleted or kept on hold in the respective Queue windows. The time duration for holding or deleting pending mails can be between 1 to 99 hours. This is a mandatory field. Note: Only numeric values and a maximum of two digits can be entered in this field.

Step by Step

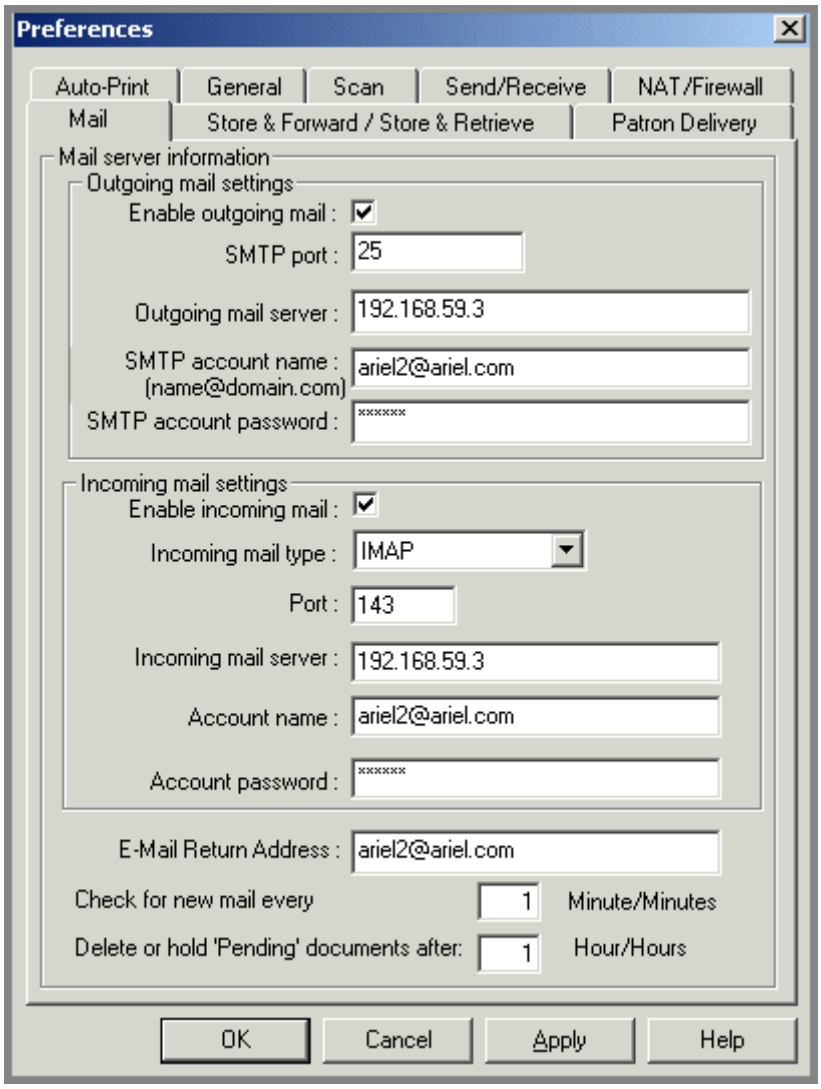
You can enter and modify mail options using the **Mail** tab of the Preferences window.

Entering Mail Options

To enter the mail options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Mail** tab in the Preferences window. The fields for entering the mail options are displayed.



Step 3. Select the required options in the Outgoing and Incoming mail settings.

Step 4. Enter the time duration for checking new emails, deleting, or holding documents in the respective fields.

Step 5. Click **Apply** to save the options as default preferences.

Step 6. Click **OK** to save and close the Preferences window.

Step 7. You can also click **Cancel** or to close the Preferences window without saving the details.

Modifying Mail Options

To modify mail options:

Step 1. Select the **Mail** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

Setting Up Patron Delivery Options

Patron delivery options refer to the delivery options that can be set up for sending documents to patrons. The documents are sent to patrons via email or FTP.

In Ariel, the patron delivery option includes details such as delivery mode, document type, email notification, and document management details. You can also specify whether copyright notice has to be included when documents are sent to patrons. In addition, you can link the application to an external ILL Manager Patron database and specify whether documents can be automatically forwarded to the patrons. You can also specify the return email address to receive email responses from patrons.

You can set up the default document type as Tagged Image File Format (TIFF) or Portable Document Format (PDF) to send documents to patrons. The default delivery mode can also be set as email or FTP. When documents are sent using FTP, they are posted to the specified FTP server and the patrons can access and view the document by specifying the Personal Identification Number (PIN) or password.

In the email notification message section, you can specify the delivery mode, the subject, and the text for the email notification message. Once the email notification is sent, you can set up options for the application to remove posted documents from the server after a specific period in the document management section.

When the ILL Manager Patron database is enabled, the application is linked to the data source name, using which the list of registered patron addresses can be viewed and documents can be sent to them by any Ariel workstation in the network.

You can specify the FTP server information and schedule the time for daily maintenance of the Delivery Queue window in the Advanced Options window. You can also specify the server details and the time for daily maintenance. The time duration must be specified based on the availability of both the server and the Ariel workstation. During maintenance, the application will remove files from the server and delete entries in the Delivery Queue window according to the preferences set.

When the application is in the client mode, the Default document type, Delivery Method, E-mail Return Address fields, and ***Enable links to ILL Manager Patron database*** *check box will be enabled in the* ***Patron Delivery*** *tab of the Preferences window*

You can use the **Patron Delivery** tab of the Preferences window to set up the patron delivery options.

Field Descriptions

The fields in the **Patron Delivery** tab of the Preferences window are described in the following table:

Field Name	Field Description
Delivery On	Select the check box to enable delivering emails to patrons.

Field Name	Field Description
Default document type	The document format type used for sending documents to patrons. You can select the required option. The available options are: 1. PDF: Selecting this option indicates that the document will be sent to the patron in PDF format. 2. TIFF: Selecting this option indicates that the document will be sent to the patron as a TIFF image.
Delivery Method	The mode used for sending documents to patrons. You can select the required option from the drop down list. The available options are: 1. E-mail: When this option is selected, by default, the documents will be sent to patrons through email as an attachment. 2. FTP: When FTP is selected, by default, the documents will be posted on the specified FTP server from where the patron can view and access the document using the personal identification number or password.

Field Name	Field Description
E-mail Notification Message	
Delivery Method	The different methods used for sending or posting the document to a patron. You can select the required option from the drop-down list. The available options are: 1. E-mail: When you select this option, you can enter the subject line and the text of message that will be displayed when you send the document as an email attachment to a patron. 2. FTP: When you select this option, you can enter the subject line and the text of message that will be displayed in the email sent to the patron notifying that the document is posted on the web server. The patron is provided with the URL of the web server with the PIN to access the document. Note: The options in this field are only for maintaining the different messages for the email and the FTP delivery methods.

Field Name	Field Description
Subject line	The subject of the email when a document is sent to a patron. Note: 1. The maximum character limit for the subject line is 240 characters. 2. The information entered in this field will be taken as the default subject when the subject detail is not specified in the Subject Line for the selected patron category name. 3. If the subject information for a patron is not specified in this field and in the Add Patron Category Information window or Update Patron Category Information window, the application automatically displays the default subject information when the document is sent to a patron.

Field Name	Field Description
Enter text of message	The message sent to the patron. You can provide different text messages for sending documents through email or FTP. When sending documents through email, you can specify the document ID, file name, and title of the document. You can also mention that the document requested has been attached with the email. When sending documents through FTP, you can specify the URL of the web server, the PIN for accessing the document, and the instructions for accessing it. Note: 1. Information such as document ID, file name, title, URL, and PIN must be specified within '$$ $$'. For example, '$$TITLE$$' represents the title of the document which will be automatically displayed from the document's Bibliographic Description in the Bibliographic Info window. Similarly, '$$PIN$$' represents the PIN that is generated when adding the details of a new patron name. 2. The information entered in this field will be taken as the default text message when the email text is not specified in the Enter text of message field for the selected patron category. 3. If the email text information for a patron is not specified in this field and in the Add Patron Category Information window or Update Patron Category information window, the application automatically displays the default email text information when the document is sent to a patron.

Field Name	Field Description
Document Management	
Remove documents from server after	The duration after which the document sent through FTP will be removed from the server. The time duration for removing documents from the server can be between 1 to 99 days or views. You can specify the time duration in days or number of views. 1. Days: When the duration is specified in days, the document will be removed from the server after the specified number of days. You can select the time duration within the range of 1 to 99 days. 2. Views: When the duration is specified by the number of times the document can be viewed, the document will be removed from the server after the specified number of times it is viewed. You can select the number of views within the range of 1 to 99. Note: 1. It is mandatory to specify the time duration in days as well as in views. 2. The option of deleting the document after the specified number of views is available only for documents that are sent through FTP. 3. Only numeric values and a maximum of two digits can be entered in this field.

Field Name	Field Description
For Patron Delivery Queue	
Delete documents sent via e-mail after	The time duration after which the documents with the status 'Sent' in the Delivery Queue window will be deleted. The time duration for deleting documents sent via email can be between 1 to 99 hours or days. You can select the required option. The available options are Hours and Days. Note: 1. This is a mandatory field. 2. Only numeric values and a maximum of two digits can be entered in this field.
Delete documents removed from server after	The time duration after which "removed" documents will be deleted from the Delivery queue. The time duration for deleting documents that are removed from the server can be between 1 to 99 hours or days. You can select the required option. The available options are Hours and Days. This is a mandatory field. Note: Only numeric values and a maximum of two digits can be entered in this field.
E-Mail Return Address	The email address to which a patron may respond after receiving an Ariel email or notification. This is a mandatory field.

Field Name	Field Description
Include Copyright Notice as first page of document	Select the check box to include the copyright notice as the first page of the document.
Enable links to ILL Manager Patron database	Select this check box to use patron information from ILL Manager Patron database. The details of the patron selected will be included in the Ariel's patron list. When this check box is selected, the application will be connected to an external patron database. You can select a patron name from this list and send documents to patrons. Note: When this check box is selected, the Search ILL button in the Patron List window and Send to Patron window will be enabled.
Auto Forwarding to Patron	Select the check box to automatically forward the received document to a patron if the patron name is specified by the sender. Note: 1. When the received documents are forwarded to patrons, the application will check if the patron details exist in your patron list and the **Auto Forwarding to Patron** check box is selected. If both the conditions are satisfied, the documents are sent to patrons. 2. Auto forwarding documents to patrons can be done only if the Ariel workstation from where the document has been received has specified the patron's name or email address.

The fields in the Advanced Options are described in the following table.

Field Name	Field Description
Server Information	
Server address	The Internet Protocol address of the FTP server where the documents can be posted to be viewed by the patrons. This is a mandatory field.
User name	The account name that will be used for posting the documents to the FTP server.
Password	The password for the account name field above. This field will be enabled when you enter an account name in the User name field.
Password (Confirm)	You must enter the same password specified in the Password field for confirmation. This field will be enabled only when you enter the administrator's name in the User name field.
Patron Delivery daily maintenance	
Schedule daily maintenance for	The time at which the daily maintenance for the application will be carried out. You can enter the time in hh:mm:ss (12-hour) format. You can also use the up and down arrow buttons for changing the time. For example, to change the time from 10:30:33 am to 11:30:33 am, click on the hour and click the up arrow button. When the application is accessed, based on the time duration specified, a message will be displayed stating that the maintenance is due and can be carried out.

Step by Step

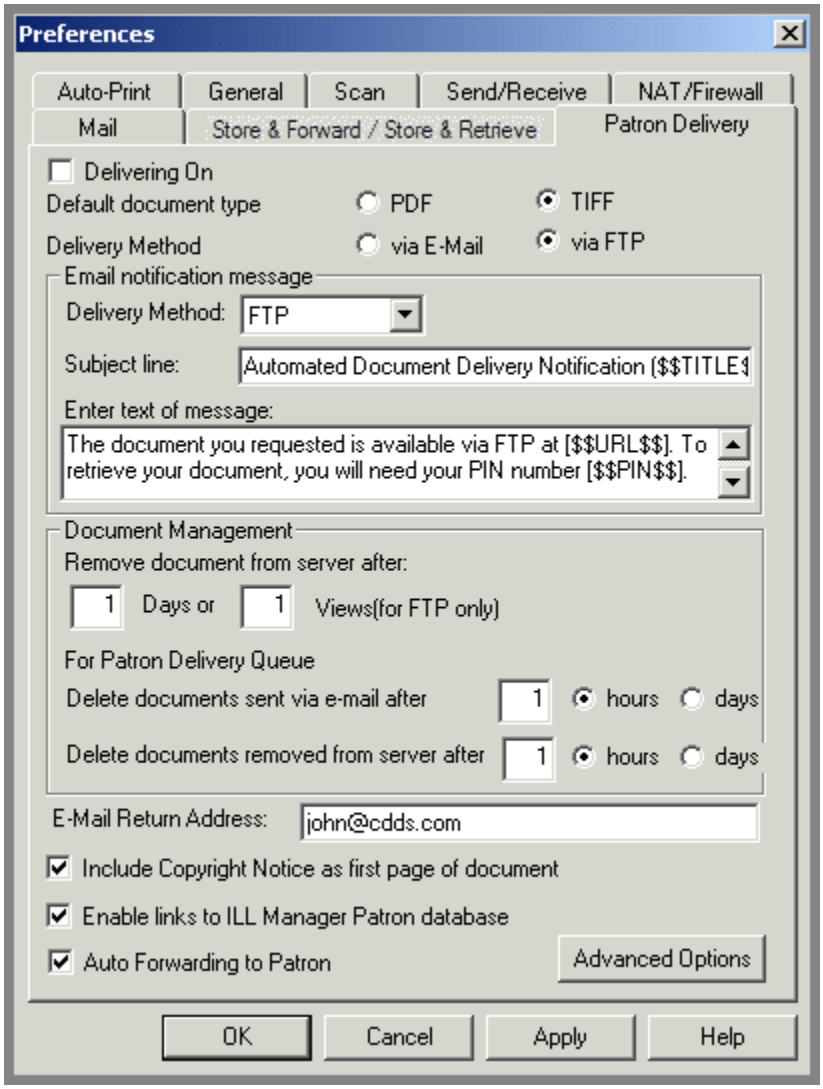
You can enter and modify patron delivery options using the **Patron Delivery** tab of the Preferences window. You can also enter and modify the advanced options using the Advanced Options window.

Entering Patron Delivery Options

To enter the patron delivery options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Patron Delivery** tab in the Preferences window. The fields for entering the patron delivery options are displayed.



Step 3. Select the required options in the Delivery On, Default document type, and Delivery method fields.

Step 4. Enter the relevant details in Email notification message and Document Management sections.

Step 5. Select the required options for including copyright notice, enabling links to ILL Manager Patron database, and auto forwarding documents to patrons.

Step 6. Enter the email return address.

Step 7. Click **Apply** to save the options as default preferences.

Step 8. Click **OK** to save and close the Preferences window.

Step 9. You can also click **Cancel** or to close the Preferences window without saving the details.

*1. When the Delivering On option is selected at the application level, the Delivering option in the **Settings** menu will be automatically selected. A tick mark will be displayed before this option in the **Settings** menu. You can temporarily suspend delivery of documents to the patrons by selecting this option in the **Settings** menu. The tick mark disappears indicating that document delivery is temporarily suspended.*

*2. When the received documents are to be forwarded to the patrons, the application will check if the patron details exists in your patron list and the **Auto Forwarding to Patron** check box is selected. If both the conditions are satisfied, the documents are sent to patrons.*

3. Auto forwarding documents to patrons can be done only if the Ariel workstation from where the document has been received has specified the patron's name or email address.

Modifying Patron Delivery Options

To modify patron delivery options:

Step 1. Select the **Patron Delivery** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

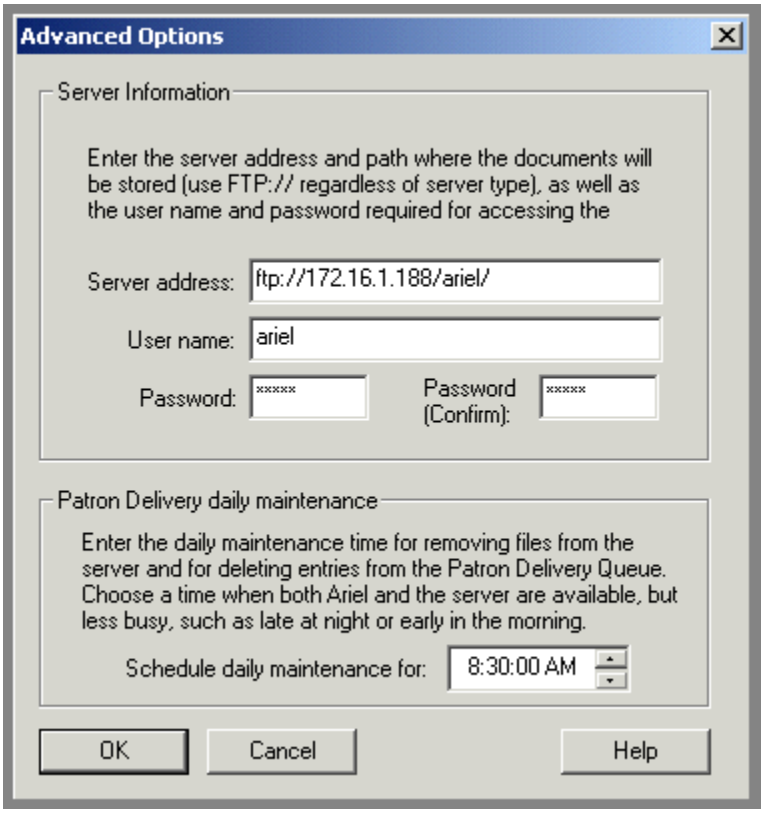
Entering Advanced Options

To create the advanced options:

Step 1. Navigate to the Preferences window.

Step 2. Select **Patron Delivery** tab in the Preferences window.

Step 3. Click **Advanced Options**. The Advance Options window is displayed.


Advanced Options
Server Information
Enter the server address and path where the documents will be stored (use FTP:// regardless of server type), as well as the user name and password required for accessing the
Server address:
ftp://172.16.1.188/ariel/
User name:
ariel
Password:
*****
Password (Confirm):
*****
Patron Delivery daily maintenance
Enter the daily maintenance time for removing files from the server and for deleting entries from the Patron Delivery Queue. Choose a time when both Ariel and the server are available, but less busy, such as late at night or early in the morning.
Schedule daily maintenance for:
8:30:00 AM
OK
Cancel
Help

Step 4. Enter the server information and patron delivery daily maintenance details.

Step 5. Click **OK** to save and close the Advanced Option window and return to the Preferences window.

Step 6. You can also click **Cancel** or to close the Advanced Options window without saving the details and return to the Preferences window.

Modifying Advanced Options

To modify patron delivery options:

Step 1. Navigate to the Advanced Options window.

Step 2. Make the necessary changes in the relevant fields.

Step 3. Click **OK** to save and close the Advanced Options window and return to the Preferences window.

Step 4. You can also click **Cancel** or to close the Advanced Option window without saving the details and return to the Preferences window.

Setting Up Store Forward and Store Retrieve Options

Store and Forward is a process in which documents from different Ariel workstations can be stored temporarily on a server and then forwarded to other Ariel workstations.

If your institution's network system has a firewall, you can take advantage of Ariel's store-and-forward server option. By setting up one Ariel PC outside the firewall—the store and forward server—and having other Ariel stations act as "clients" for retrieving documents from the server, you can successfully avoid interference during Ariel transmissions. As long as the dedicated server is running, it can receive documents intended for client stations even if Ariel is not up and running on those stations.

Store and forward and store and retrieve options in Ariel include setting up of Internet Protocol address from where your system can establish connection to receive and send messages.

You can also specify whether your system can be a Store and Forward and Store and Retrieve server. The documents received into the Store and Retrieve server will be stored in the Received Queue window and the documents sent to the Store and Forward server will be displayed in the Send Queue window. You can set up the store and forward and store and retrieve options based on your requirements.

You can use the **Store & Forward / Store & Retrieve** tab of the Preferences window to set up the store forward and store retrieve options.

1. The syntax to use the Store and Forward method is the following: the sender has to specify the address in the following format:
<store-and-forward server>/<final address for document>
The two addresses are separated by a slash (/) with no spaces. The sender must specify the IP address, machine names of Ariel PC, or alias defined in the Address Book in the sending system.

*2. The **Store & Forward / Store & Retrieve** tab will not appear when the application is in the client mode.*

Field Descriptions

The fields in the **Store & Forward / Store & Retrieve** tab of the Preferences window are described in the following table:

Field Name	Field Description
Sender Name	
IP Address of Store-and-Retrieve Server to request documents from	The Internet Protocol address of the server from where documents stored can be retrieved. You can also specify the system name of the Store and Retrieve server. The Internet Protocol address of the specified system will be automatically displayed when you click **Apply**. You can specify the time duration for retrieving documents from the Store-and-Retrieve server in the text box next to this field which will be enabled when you enter the Internet Protocol address. The time duration can be between 1 to 99 minutes. It is mandatory to specify the time duration for retrieving documents. Note: Only numeric values and a maximum of two digits can be entered for specifying the time duration.

Field Name	Field Description
IP Address of Store-and-Forward server to request documents from	The Internet Protocol address of the server where documents can be stored and forwarded to Ariel workstations. You can also specify the system name of the Store and Forward server. The Internet Protocol address of the specified system will be automatically displayed when you click **Apply**.
StoreForward/StoreRetrieve	
This is a Store-and-Retrieve server	Select the check box to specify if your system will act as a store and retrieve server.
This is a Store-and-Forward server	Select the check box to specify if your system will act as a store and forward server.
Delete documents from Store-and-Retrieve server after	The time duration specified for deleting the documents automatically from the store and retrieve server. The time duration for deleting documents from the Store and Retrieve Server can be between 1 to 99 hours. This field will be enabled only when **This is a Store-and-Retrieve server** check box is selected. It is mandatory to specify the time duration for retrieving documents. Note: Only numeric values and a maximum of two digits can be entered in this field.

Step by Step

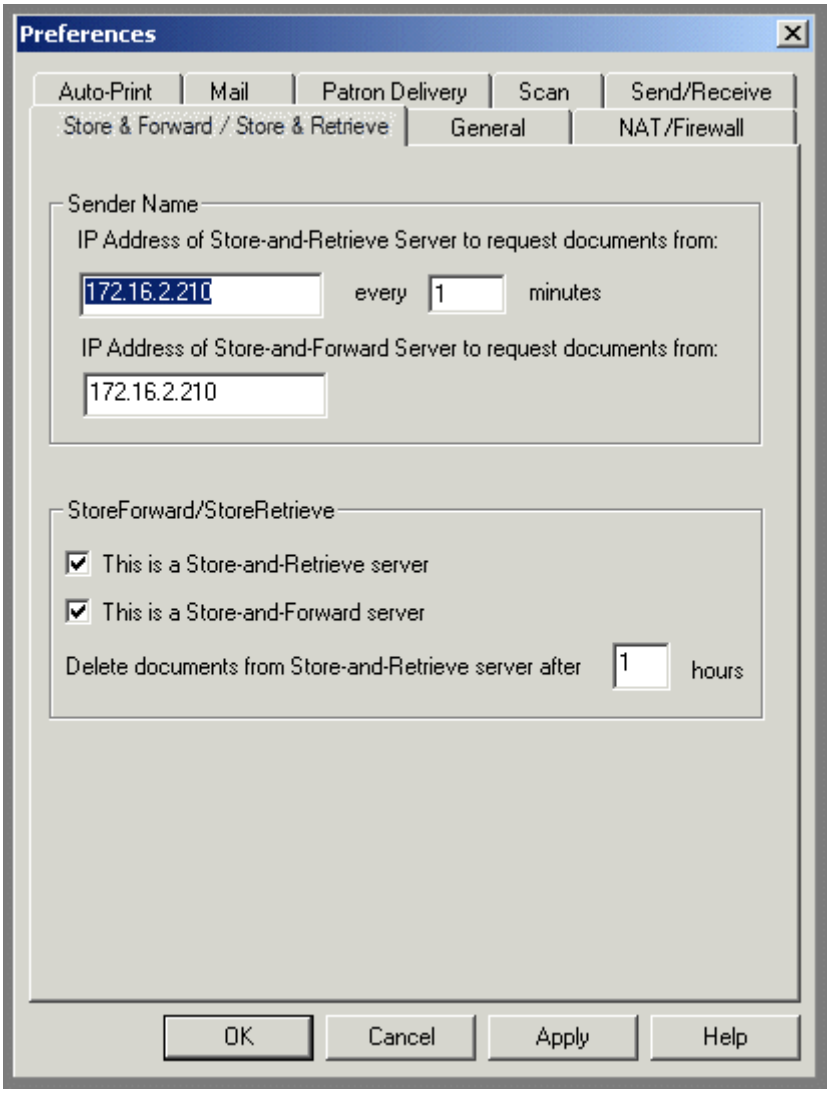
You can enter and modify store forward and store retrieve options using the **Store & Forward / Store & Retrieve** tab of the Preferences window.

Entering Store Forward and Store Retrieve Options

To enter the store forward and store retrieve options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Store & Forward / Store & Retrieve** tab in the Preferences window. The fields for entering the store forward and store retrieve options are displayed.



Step 3. Enter the details in the Sender Name and StoreForward/StoreRetrieve sections.

Step 4. Click **Apply** to save the options as default preferences.

Step 5. Click **OK** to save and close the Preferences window.

Step 6. You an also click **Cancel** or to close the Preferences window without saving the details.

Modifying Store Forward and Store Retrieve Options

To modify store forward and store retrieve options:

Step 1. Select the **Store & Forward / Store & Retrieve** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

Setting Up Send and Receive Options

Send and receive options refer to the options set up for sending or receiving documents from Ariel workstations. Through the send and receive options, you can enable sending or receiving of documents or suspend the sending or receiving process. You can specify whether the documents can be retained or deleted from the respective Queue windows after sending or printing them.

The send and receive options can be used effectively for document management purposes. Based on the options selected, you can save, delete, or print documents. You can set up the send and receive options based on your requirements.

*In the **Send/Receive** tab, only the Limit Documents to (100-999) field in the Send section is enabled when the application is in the client mode.*

You can use the **Send/Receive** tab of the Preferences window to set up the send and receive options.

Field Descriptions

The fields in the **Send/Receive** tab of the Preferences window are described in the following table:

Field Name	Field Description
Send	
Send Disposition	The various options by which the documents sent can be managed. You can select the required option. The available options are: 1. Send and Delete: Selecting this option will automatically delete the document in the Send Queue window once the receiving system acknowledges receipt of the document. 2. Send and Hold: Selecting this option will automatically hold the document in the Send Queue window once the receiving system acknowledges receipt of the document. The status of the document will be 'Held' in the Send Queue window.
Sending On	Select the check box to enable sending of documents at the application level. Documents will not be sent to the respective Ariel workstation when this check box is cleared.
Limit Documents to (100-999)	The maximum number of documents that can be saved in the Send Queue window. The limit for the documents that can be saved in the Send Queue window can be between 100 to 999. This is a mandatory field. Note: Only numeric values and a maximum of three digits can be entered in this field.

Field Name	Field Description
Receive	
Auto-Print Disposition	The various options by which the documents received can be managed. You can select the required option. The available options are: 1. Print and Delete: Selecting this option will delete the document from the Received Queue window once it is printed. 2. Print and Hold: Selecting this option will hold the document in the Received Queue window after it is printed. The status of the document will be 'Held' in the Received Queue window.
Receiving On	Select the check box to enable receiving documents at the application level. Documents will not be received when this check box is cleared.
Limit Documents to (100-999)	The maximum number of documents that can be saved in the Received Queue window. The limit for the documents that can be saved in the Received Queue window can be between 100 to 999. This is a mandatory field. Note: Only numeric values and a maximum of three digits can be entered in this field.

Step by Step

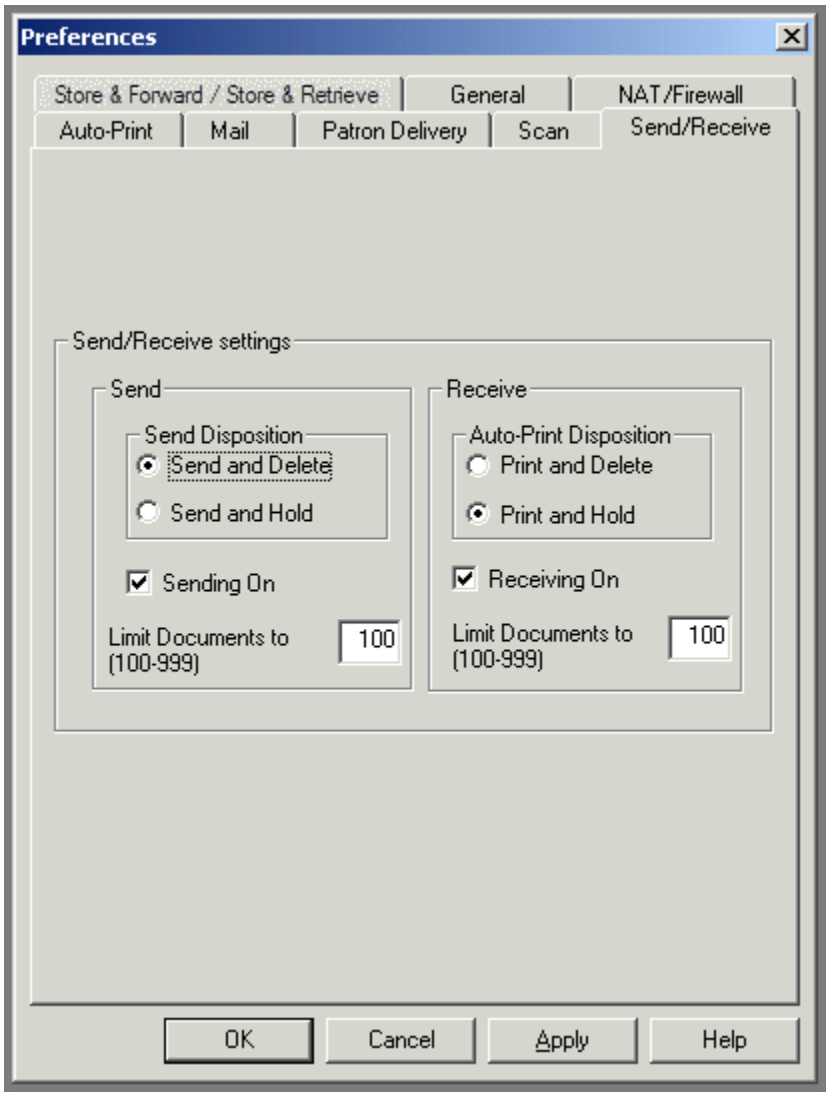
You can enter and modify the send and receive options using the **Send/Receive** tab of the Preferences window.

Entering Send and Receive Options

To enter the send and receive options:

Step 1. Navigate to the Preferences window.

Step 2. Select the **Send/Receive** tab in the Preferences window. The fields for entering the send and receive options are displayed.



Step 3. Enter the relevant details in the Send and Receive sections.

Step 4. Click **Apply** to save the options as default preferences.

Step 5. Click **OK** to save and close the Preferences window.

Step 6. You can also click **Cancel** or to close the Preferences window without saving the details.

*1. When you select Sending On at the application level, the Sending option in the **Settings** menu will be automatically selected. A tick mark appears before the Sending option in the **Settings** menu. You can temporarily suspend sending of documents by selecting this option in the **Settings** menu. The tick mark disappears indicating that the sending process is suspended.*

*2. When you select Receiving On at the application level, the Receiving option in the **Settings** menu will be automatically selected. A tick mark appears before the Receiving option in the **Settings** menu. You can temporarily suspend receiving of documents by selecting this option in the **Settings** menu. The tick mark disappears indicating that receiving of documents is suspended.*

Modifying Send and Receive Options

To modify send and receive options:

Step 1. Select the **Send/Receive** tab. The fields are displayed.

Step 2. Make the necessary changes.

Step 3. Click **Apply** to save the options as default preferences.

Step 4. Click **OK** to save and close the Preferences window.

Step 5. You can also click **Cancel** or to close the Preferences window without saving the details.

Managing the Address Book

An email or Internet Protocol address is required for sending or receiving documents from other Ariel workstations. In Ariel, you can use the Address Book feature to manage the address details of Ariel workstations. You can add and maintain the Internet Protocol or email address details of Ariel workstations. In addition, you can import the address details that are maintained in Excel or Comma Separated Value (CSV) format. The procedural and task related information for performing these tasks are discussed in the following sections:

- Creating and Maintaining Address Book
- Importing into the Address Book

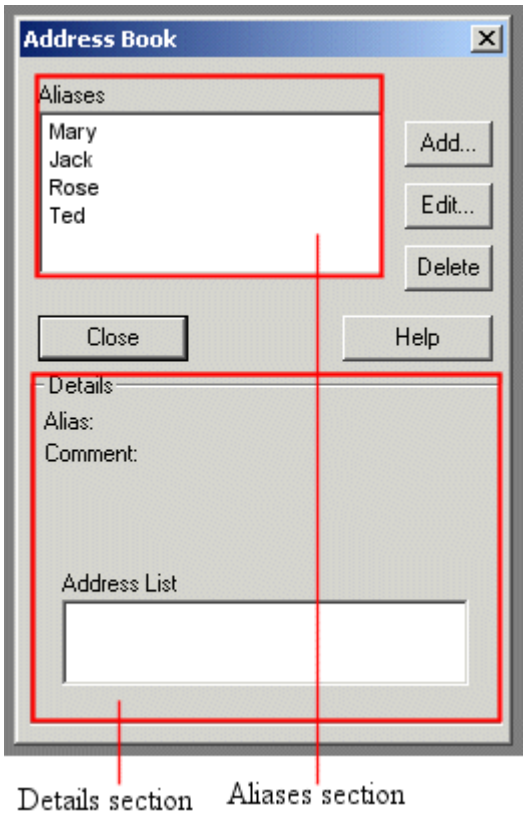
Creating and Maintaining Address Book

You can create and maintain the address details of various Ariel workstations using the Ariel Address Book feature. The address of an Ariel workstation is the Internet Protocol address of the system where Ariel is installed. Using the address book, you can maintain address details and also specify whether the coversheet can be removed.

You can add, modify, or delete the address details using the Address Book window. You can customize the Ariel address book based on your requirements.

The Address Book window consists of the following sections:

- Alias section - Lists the alias names of Ariel workstations whose addresses are maintained in the Address Book window.
- Details section - Displays the address of the alias name selected from the Aliases list.



Field Descriptions

The fields in the Address Book window are described in the following table:

Field Name	Field Description
Aliases	
Aliases	Displays a list of the names of Ariel workstations, which are added using the Add New Address window. You can select a name from the Aliases list for modifying and deleting the address details.

Field Name	Field Description
Details	
Alias	The pseudo name assigned to an Ariel workstation which is automatically displayed when you select an alias name from the Aliases list.
Comment	Any remark or comment about the Ariel workstation which is automatically displayed when you select an alias name from the Aliases list.
Auto Removal Cover Sheet is Enabled/Disabled	Indicates the status of the auto removal of cover sheet option. This will be displayed based on the selection made in the **Auto Remove CoverSheet** check box in the Add New Address window. When the **Auto Remove CoverSheet** check box is selected in the Add New Address window, 'Auto Removal Cover Sheet is Enabled' will be displayed in this field. When the **Auto Remove Cover Sheet** check box is cleared in the Add New Address window, 'Auto Removal Cover Sheet is Disabled' will be displayed in this field.
Address List	Displays the Internet Protocol or email address of the Ariel workstation.

The fields in the Add New Address window are described in the following table:

Field Name	Field Description
Alias	The pseudo name assigned to an Ariel workstation. This is a mandatory field.
Comment	Any remark or comment about the Ariel workstation.

Field Name	Field Description
Address	The Internet Protocol or email address of the Ariel workstation. You can also specify the system name of an Ariel workstation in this field. The application will automatically display the Internet Protocol address of the Ariel workstation in the Address Book window. This is a mandatory field.
Auto Remove CoverSheet	Select this check box to automatically remove the cover sheet for a document when received from the specified Ariel workstation.

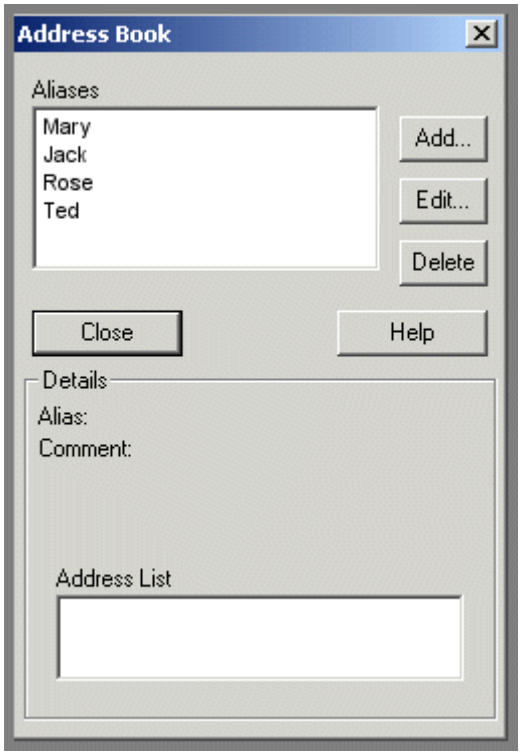
Step by Step

You can access, view, add, modify, and delete address details using the Address Book window.

Accessing the Address Book Window

To access the address book window:

Step 1. Select **Address Book → Entries...**. The Address Book window is displayed.



Step 2. Create and maintain the address details as required.

Viewing Address Book Details

To view the address book details:

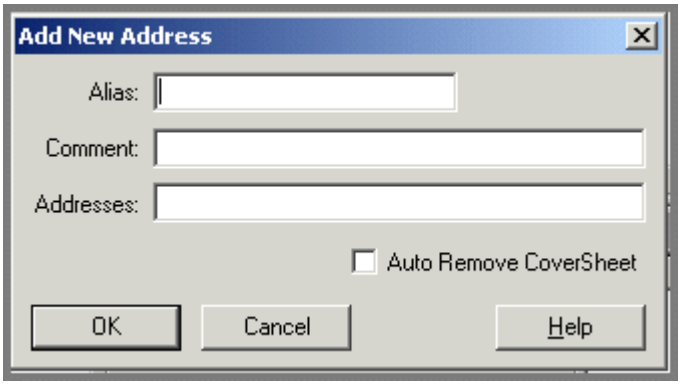
Step 1. Select a name from the Aliases list in the address book.

Step 2. The Internet Protocol address of the selected alias will be displayed in the Details section.

Adding Address Details

To add address details:

Step 1. Click **Add** in the Address Book window. The Add New Address window is displayed.



Step 2. Enter the alias name, comment, and the Internet Protocol address.

Step 3. Select the **Auto Remove CoverSheet** check box if you want to remove the cover page when sending the document to the specific Ariel workstation.

Step 4. Click **OK** to save and close the Add New Address window.

Step 5. The alias name is added to the Aliases list in the Address Book window.

Step 6. You can also click **Cancel** or to close the Add New Address window without saving the details.

1. You can also add the address details of an Ariel workstation from the Send window while sending documents to the Ariel workstations.

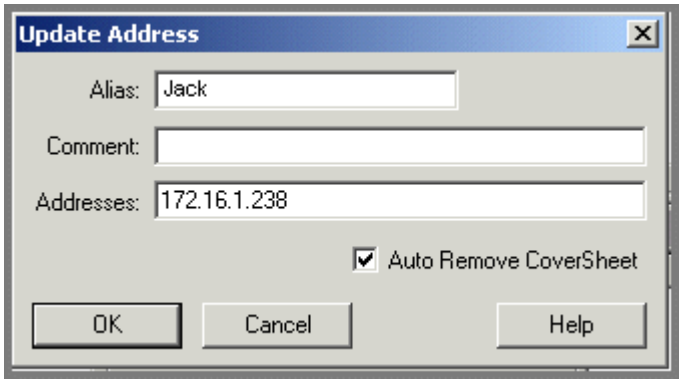
2. To add the address details of the Ariel workstations, you can also specify the system name of the Ariel workstations in the Addresses field. The application will automatically display the Internet Protocol address of the Ariel workstation in the Address Book window.

Modifying Address Details

To modify address details:

Step 1. Select an alias name whose details you want to modify from the Aliases list in the Address Book window.

Step 2. Click **Edit**. The Update Address window is displayed.



Step 3. Make the necessary changes.

Step 4. Click **OK** to save and close the Update Address window.

Step 5. You can also click **Cancel** or to close the Update Address window without saving the changes.

1. You can also modify the address details of an Ariel workstation from the Send window while sending documents to the Ariel workstations.

*2. You can modify only one alias at a time. An appropriate error message will be displayed if you click **Edit** after selecting more than one alias*

Deleting Address Details

To delete address details

Step 1. Select an alias name you want to delete from the Aliases list in the Address Book window.

Step 2. Click **Delete**. A confirmation message for deletion is displayed. Click **OK** to delete the address.

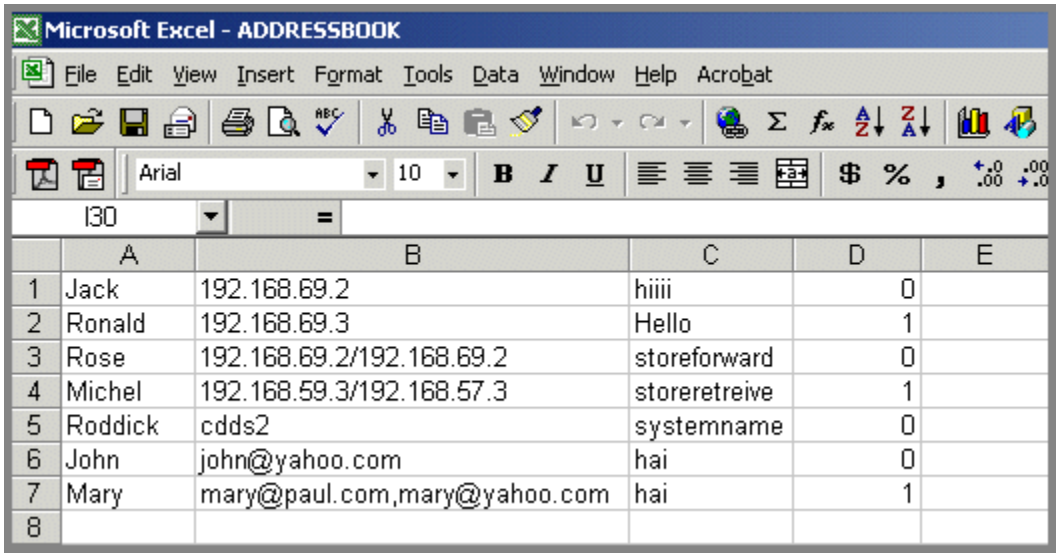
Step 3. You can also click **Cancel** or to cancel deletion.

You can also use the Delete key on your keyboard for deleting the address details of Ariel workstations.

Importing into the Address Book

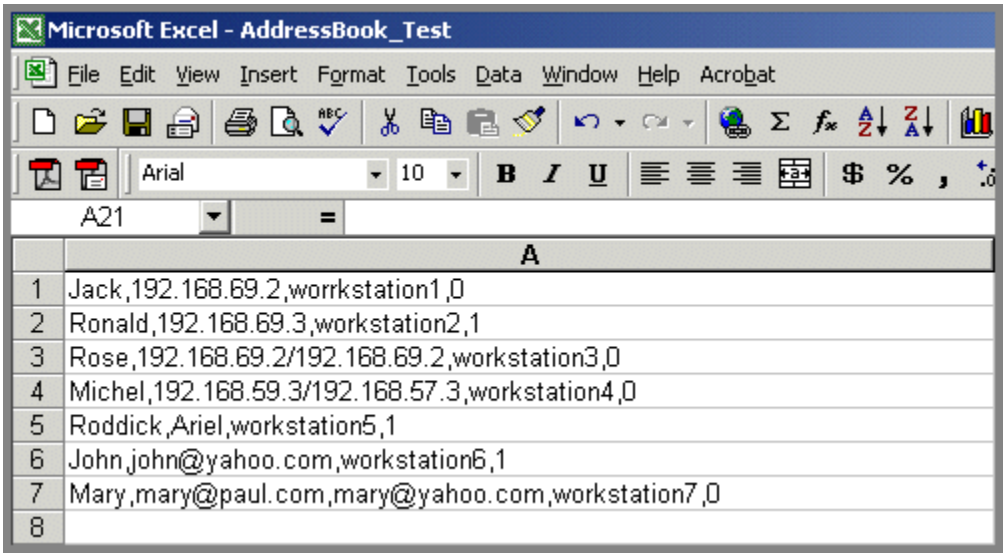
You can import the Internet Protocol addresses or email addresses of Ariel workstations available in other applications such as Microsoft Outlook to Ariel. The address book from other applications or POP 3 clients can be exported in the CSV or Excel format and then imported to Ariel.

For importing addresses from Excel files, the details of the Ariel workstation must be listed in a four-column format. The first column must contain the name or alias of the Ariel workstation; the second column must contain the Internet Protocol address, system name, or the mail ID of the Ariel workstation; the third column must contain the comments for the Ariel workstation; and the forth column must contain validations to enable auto-remove coversheet while sending documents to Ariel workstations. If you want to enable auto remove coversheet for the Ariel workstation, the validation must be 1 and if you want to disable auto remove coversheet, the validation must be 0.



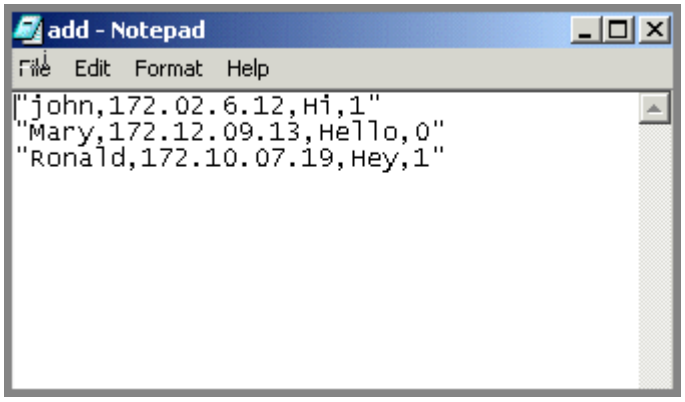
	A	B	C	D	E
1	Jack	192.168.69.2	hiiii	0	
2	Ronald	192.168.69.3	Hello	1	
3	Rose	192.168.69.2/192.168.69.2	storeforward	0	
4	Michel	192.168.59.3/192.168.57.3	storeretreive	1	
5	Roddick	cdds2	systemname	0	
6	John	john@yahoo.com	hai	0	
7	Mary	mary@paul.com,mary@yahoo.com	hai	1	
8					

For importing addresses from CSV files, the details of the Ariel workstation must be listed in a single column format. All the field details must be separated by a comma and without any spaces. The first detail must contain the name or alias of the Ariel workstation; the second detail must contain the Internet Protocol address, system name, or the mail ID of the Ariel workstation; the third detail must contain the comments for the Ariel workstation; and the forth detail must contain validations to enable auto-remove coversheet while sending documents to Ariel workstations. If you want to enable auto remove coversheet for the Ariel workstation, the validation must be 1 and if you wan to disable auto remove coversheet, the validation must be 0.



	A
1	Jack,192.168.69.2,worrkstation1,0
2	Ronald,192.168.69.3,workstation2,1
3	Rose,192.168.69.2/192.168.69.2,workstation3,0
4	Michel,192.168.59.3/192.168.57.3,workstation4,0
5	Roddick,Ariel,workstation5,1
6	John,john@yahoo.com,workstation6,1
7	Mary,mary@paul.com,mary@yahoo.com,workstation7,0
8	

You can also save addresses in the notepad and save it as a CSV file. While storing the address details, it must be listed in a single line format. All the field details must be separated by a comma and without any spaces. The first detail must contain the name or aliases of the Ariel workstation; the second detail must contain the Internet Protocol address, system name, or the mail ID of the Ariel workstation; the third detail must contain the comments for the Ariel workstation; and the forth detail must contain validations to enable auto-remove coversheet while sending documents to Ariel workstations. If you want to enable auto remove coversheet for the Ariel workstation, the validation must be 1 and if you wan to disable auto remove coversheet, the validation must be 0. All the above mentioned details must be specified within double quotes.



While saving the notepad file, you must specify the file name with the .csv extension in double quotes. For example, "address.csv". The file will be saved in the CSV format that can be imported to Ariel.

1. While importing addresses from the CSV format, there should be no space between the fields and commas. The field must be separated only by commas.

2. All the fields in the Address book are mandatory.

3. If the address book is not imported, an appropriate error message will be displayed.

Ariel will not overwrite any alias name. If an alias name that already exists in the address book, is imported, an error is displayed that some rows were not imported. All the alias details except the repeated address will be imported into the address book.

You can use the Open dialog box to import addresses.

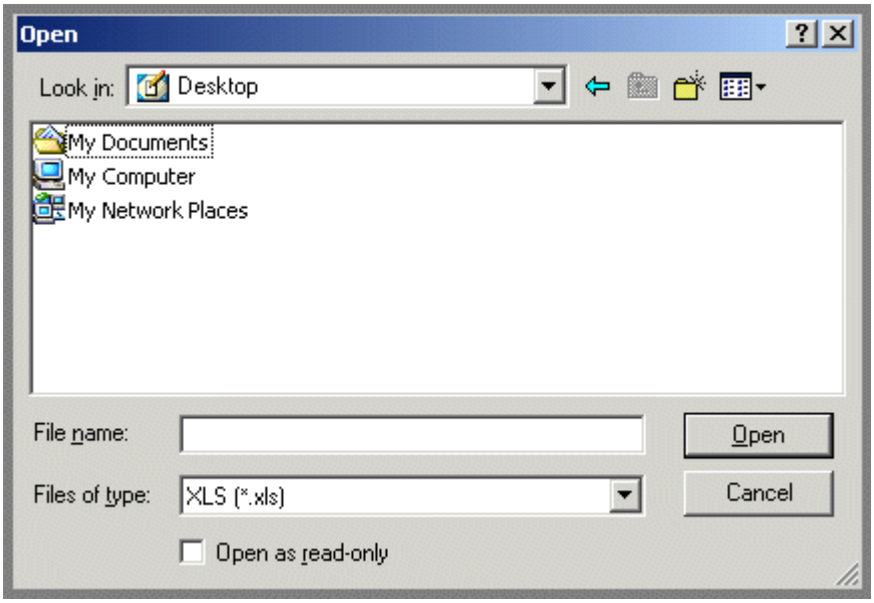
Step by Step

You can import addresses from an Excel and CSV file to Ariel using the Open dialog box.

Importing Address Details in Excel Format

To import address details that are available in Excel format:

Step 1. Select **Address Book → Get External Data → Import Excel File**. The Open dialog box is displayed.



Step 2. Select the location of the file.

Step 3. Select **Open as read-only** check box if required.

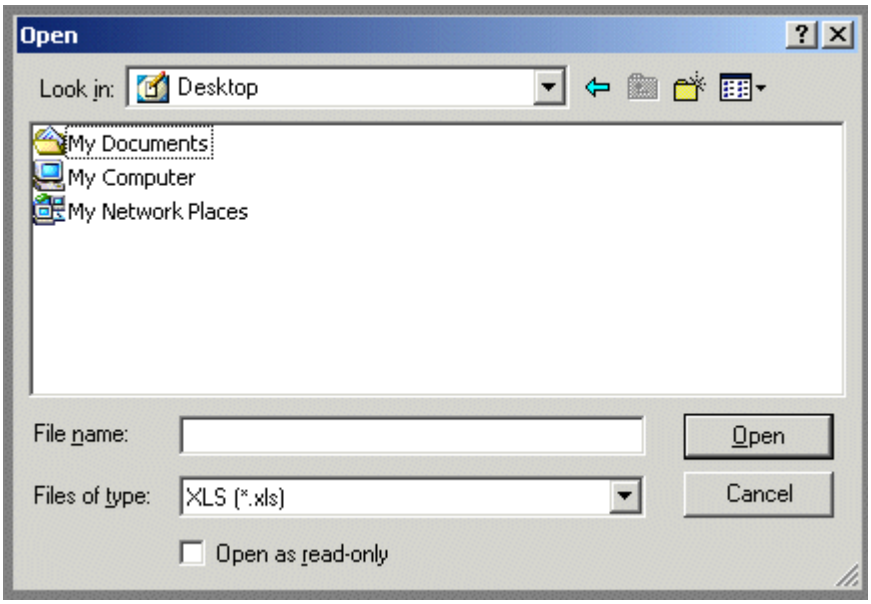
Step 4. Click **Open**. A message is displayed that the address details are successfully imported. The addresses in the Excel file are imported to the address book.

Step 5. Click **OK**. The details of the imported addresses are available in the Aliases field of the Address Book window.

Importing Address Details in CSV Format

To import address details that are available in CSV format:

Step 1. Select **Address Book→ Get External Data → Import CSV File**. The Open dialog box is displayed.



Step 2. Select the location of the file.

Step 3. Select **Open as read-only** check box if required.

Step 4. Click **Open**. A message that the address details are successfully imported is displayed. The addresses in the CSV file are imported to the address book.

Step 5. Click **OK**. The details of the imported addresses are available in the Aliases field of the Address Book window.

Managing Patron Details

In Ariel, you can send documents to patrons. Documents are sent to patrons through email or FTP. You can use the Patron List feature in Ariel to set up patron categories, create and maintain patron details, and import addresses from Excel or CSV format. You can customize the patron details based on your requirements. The procedural and task related information for managing the patron details are discussed in the following sections:

- Setting Up Patron Categories
- Creating and Maintaining the Patron List
- Importing Patron Lists

Setting Up Patron Categories

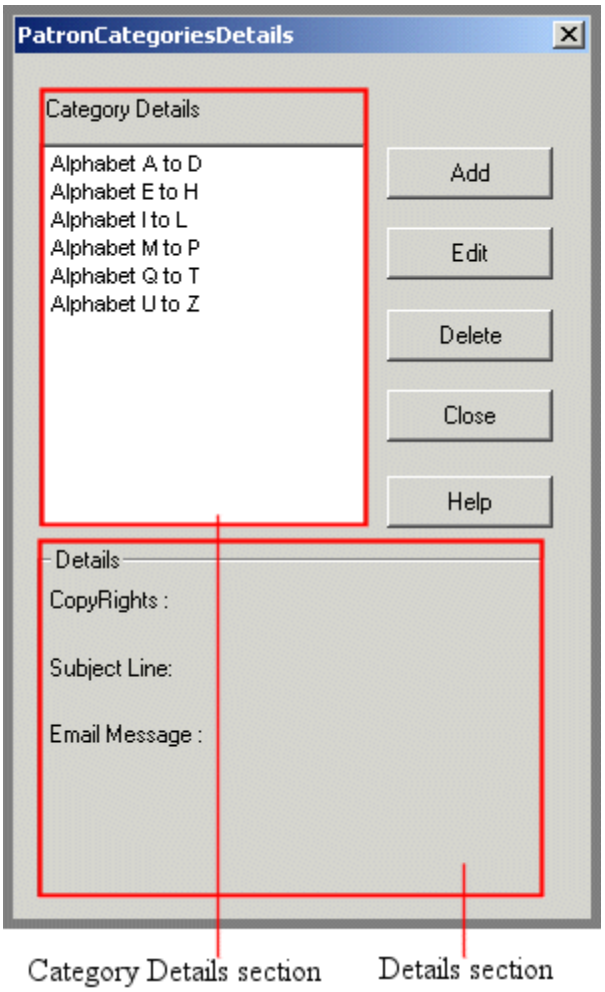
Patron categories refer to the classification of patrons based on the category to which they belong. For example, you can classify patrons based on the country or state they are located.

You can use the Patron Categories Details window to set up patron categories. You can add, modify, or delete the patron categories.

The Patron Categories Details window consists of the following sections:

- Category Details List section - Lists the different categories of patrons.

- Details section - Displays the copyright, subject line, and the email message based on the category selected in the Category Details list.



Field Descriptions

The fields in the Patron Categories Details window are described in the following table:

Field Name	Field Description
Category Details	
Category Details	Displays a list of categories created for a patron group. The patron categories are added using the Add Patron Delivery Information window.
Details	
Copyrights	Indicates the custom copyright notice details when documents are sent to patrons. This information is automatically displayed when a patron category is selected.
Subject Line	Indicates the subject specified when documents are sent to patrons. This information is automatically displayed when you select a patron category.
Email Message	Indicates the email message that will be sent when documents are sent to patrons. This information is automatically displayed when you select a patron category.

The fields in the Add Patron Category Information window are described in the following table:

Field Name	Field Description
Category Name	The name of the category according to which the patrons can be classified. This is a mandatory field.
Custom Copyright Notice	The copyright notice text that gets added as a copyright notice page when sending documents to the patrons.

Field Name	Field Description
Subject line	The subject line that the patron sees when receiving documents through email or FTP. Note: 1. If the subject of the email is not specified, the subject line information specified in the **Patron Delivery** tab of the Preferences window will be taken as the default subject line. 2. If the subject information is not specified in this field and in the **Patron Delivery** tab of the Preferences window, the application automatically displays the default subject information when the document is sent to a patron.
Enter text of message	The email message body that the patron sees when receiving documents through email or FTP. Note: 1. If the email text is not specified, the text information specified in the **Patron Delivery** tab of the Preferences window will be taken as the default email text. 2. If the email text is not specified in this field and in the **Patron Delivery** tab of the Preferences window, the application automatically displays the default email text when the document is sent to the patron.

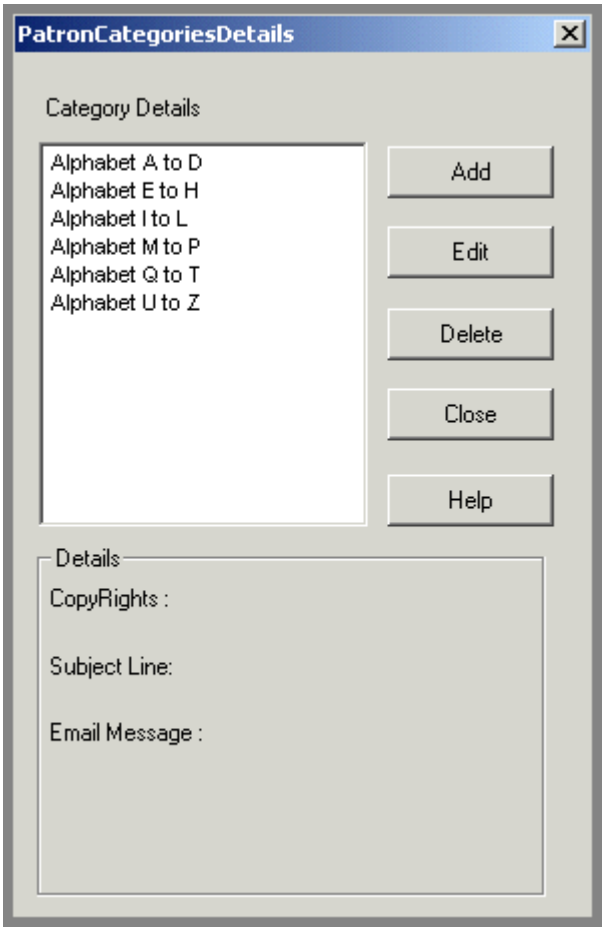
Step by Step

You can access, view, and delete the patron categories using the Patron Categories Details window. You can add patron categories using the Add Patron Category Information window and modify the patron categories using Update Patron Category Information window.

Accessing the Patron Categories Details Window

To access the Patron Categories Details window:

Step 1. Select **Patron List → Categories**. The Patron Categories Details window is displayed.



Step 2. Create and maintain patron categories as required.

Viewing Patron Category Details

To view patron category details

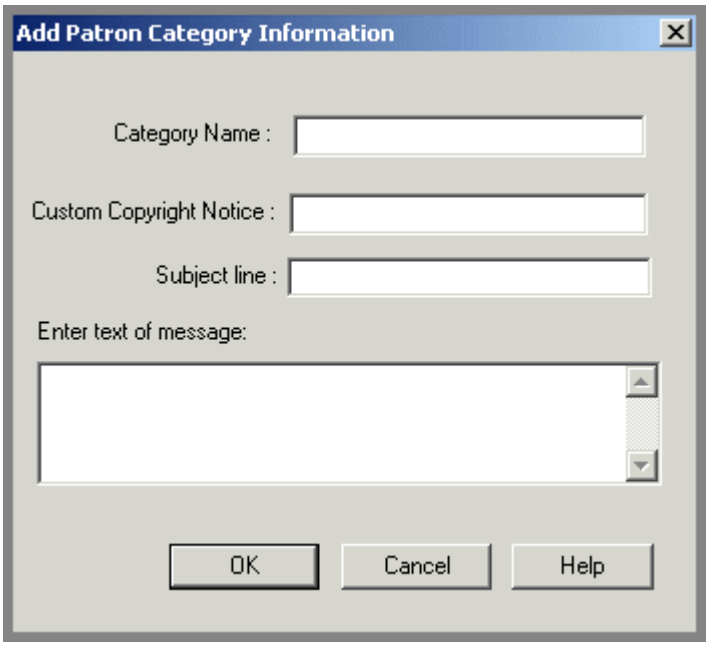
Step 1. Select a category from the Category Details List section in the Patron Categories Details window.

Step 2. The details of the selected category are displayed in the Details section.

Adding Patron Category Details

To add patron category details:

Step 1. Click **Add** in the Patron Categories Details window. The Add Patron Category Information window is displayed.



Step 2. Enter the relevant details in the category name, custom copyright notice, subject line, and enter text of message fields.

Step 3. Click **OK** to save and close the Add Patron Delivery window and return to the Patron Categories Details window. The category name added is displayed in the Category Details List section.

Step 4. You can also click **Cancel** or to close the Add Patron Delivery window without saving the details and return to the Patron Categories Details window.

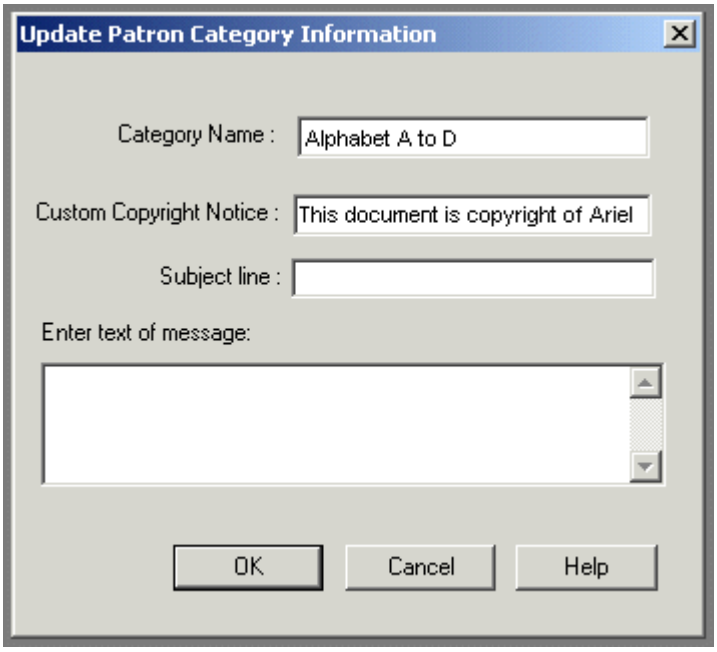
Step 5. Click **Close** or to close the Patron Categories Details window.

Modifying Patron Category Details

To modify patron category details:

Step 1. Select a category you want to modify from the Category Details List section in the Patron Categories Details window.

Step 2. Click **Edit**. The Update Patron Category Information window is displayed.



Step 3. Make the necessary changes.

Step 4. Click **OK** to save the changes and close the Update Patron Category Information window and return to the Patron Categories Details window.

Step 5. You can also click **Cancel** or to close the Update Patron Category Information window without saving the details and return to the Patron Categories Details window.

Step 6. Click **Close** or to close the Patron Categories Details window.

Deleting Patron Category Details

To delete patron category details:

Step 1. Select a category name you want to delete from the Category Details List section in the Patron Categories Details window.

Step 2. Click **Delete**. A confirmation message for delete is displayed. Click **OK** to delete the patron category.

Step 3. You can also click **Cancel** or to cancel deletion.

Step 4. Click **Close** or to close the Patron Categories Details window.

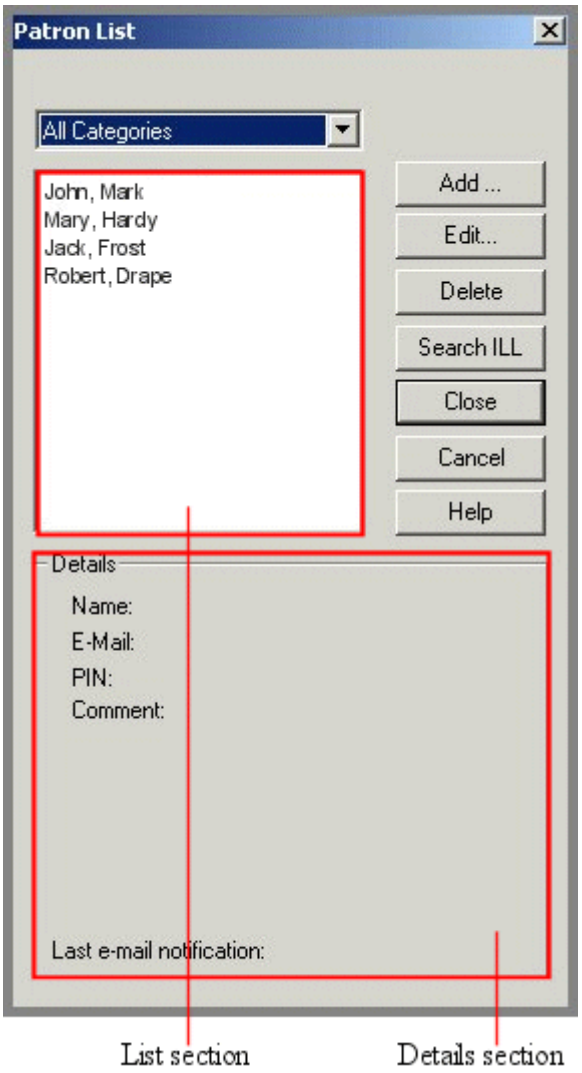
Creating and Maintaining the Patron List

In Ariel, you can add patron details to an existing patron list. You can assign patrons to a specific category for identifying them. You can use the Patron List window to add, modify, or delete the patron details.

The Patron List window consists of the following sections:

- List section - Lists the patron names based on the patron category selected from the drop-down list.

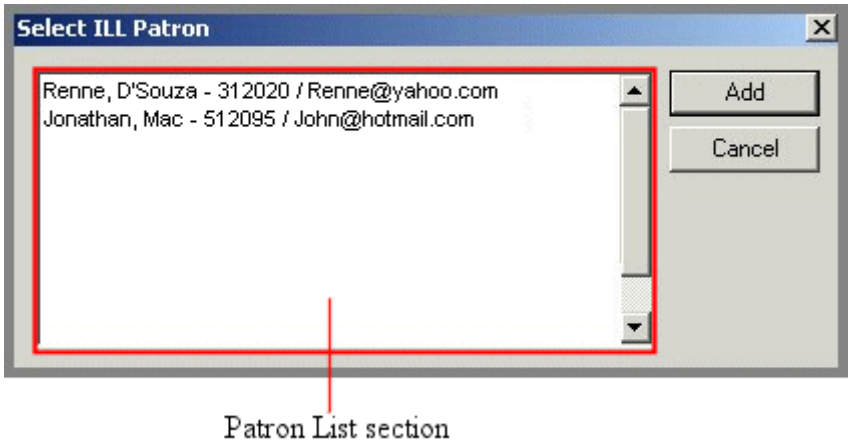
- Details section- Displays the patron details such as name, email address, personal identification number, and any remarks about the patron based on the patron name selected in the List section.



You can also add the patron details by selecting the patron name from the ILL Manager Patron database. You can use the Select ILL Patron window to access the ILL Manager Patron database and view the details of the registered patrons. Using the patron list, you can import the details of the required patrons and send documents to them.

The Select ILL Patron window consists of the following sections:

- Patron List section - Lists the details of the patron. You can select a patron and add the details to your patron list.



The command buttons in the Patron List window are described in the following table:

Button	Used to
Search ILL	To link the application to the ILL Database Manager. The data source name consists of a list of all patrons registered with it. This list is accessible to the different Ariel workstations in a network. Ariel will automatically display the details of the patron in the Select ILL Patron window when you click **Search ILL** in the Patron List window. You can save the patron details as required. Note: This button will be enabled only when the **Enable links to ILL Manager Patron database** check box in the **Patron Delivery** tab of the Preferences window is selected.

Field Descriptions

The fields in the Patron List window are described in the following table:

Field Name	Field Description
All Categories	Lists the different patron categories. You can select a specific patron category from the drop-down list. By default 'All Categories' will be displayed in the drop-down list. Note: 1. The categories displayed in this field are set up in the Add Patron Category Information window. 2. Based on the patron category selected, the patron names are displayed in the List section. You can select a name from the list for modifying and deleting the patron details.
Details	
Name	The name of the patron which is automatically displayed when you select a patron name from the List section.
E-Mail	The email address of the patron which is automatically displayed when you select a patron name from the List section.

Field Name	Field Description
PIN	The Personal Identification Number (PIN) number of the patron which is automatically displayed when you select a patron name. Ariel automatically generates a personal identification number for a patron to access documents on a server. If you use more than one Ariel workstation to deliver documents to your patrons, you can assign a unique PIN to identify the patron. Otherwise, to retrieve documents the patron must log on using a different PIN each time. For example, you can use the patron's ID number as the PIN. Note: The maximum number of characters you can enter for a PIN is 16.
Comment	Displays any remarks or comment about the patron.
Always send document via E-mail	Indicates the mode by which the documents will be sent to patrons. This information will be displayed when you select **Always Send Document via E-mail** check box in the Add Patron Delivery Information window.
Last e-mail notification	Displays the date and time of the most recent email notification sent or posted to the patron.

The fields in the Add Patron Delivery Information window are described in the following table.

Field Name	Field Description
Last Name	The last name of the patron. This is a mandatory field.
First Name	The first name of the patron.
Category	The classification of the patron. You can select the required option from the drop-down list. The patron categories are added in the Add Patron Category Information window. This is a mandatory field.
E-mail Address	The email address of the patron. This is a mandatory field.
PIN	The Personal Identification Number of the patron which is automatically displayed when this window is accessed. Ariel automatically generates a personal identification number for a patron to access documents on a Web server. This is a mandatory field. Note: 1. The maximum number of characters you can enter for a PIN is 16. 2. You can modify the PIN if required.
Comment	Any remarks or comments about the patron.

Field Name	Field Description
Always send document via E-mail	Select this check box to send documents to patrons only through email. When this check box is selected, the Send PDF and Send TIFF fields are enabled. You can select the required option to send the document to the patrons in the PDF or TIFF format. When Send PDF is selected, the document will be sent to the patrons in the PDF format. When Send TIFF is selected, the document will be sent to the patrons in the TIFF format.
Update patron information for	Update the patron details for transactions. You can select the required option. The available options are: 1. This transaction only: Select this option to apply the changes to the current transaction only. 2. All transactions: Select this option to apply the changes to all the transactions. Note: This field will be enabled only while accessing the Update Patron Deliver Information window by clicking **Edit** in the Send to Patron window. For more information see, "Sending Documents to Patrons."

The fields in the Select ILL Patron window are described in the following table. This window can be accessed by clicking **Search ILL** in the Patron List window.

Field Name	Field Description
Patron List section	Lists the patron details. You can add the patron details by clicking **Add**.

Before You Begin

Before setting up patron details, you need to set up the patron categories. For information see "Setting Up Patron Categories".

Before you search the patron details by clicking **Search ILL** ensure that you are connected to the ILL patron database where the list of all the patrons is registered. You need to select the **Enable links to ILL Manager Patron database** check box in the **Patron Delivery** tab of the Preferences window to enable the application to connect to the data source name.

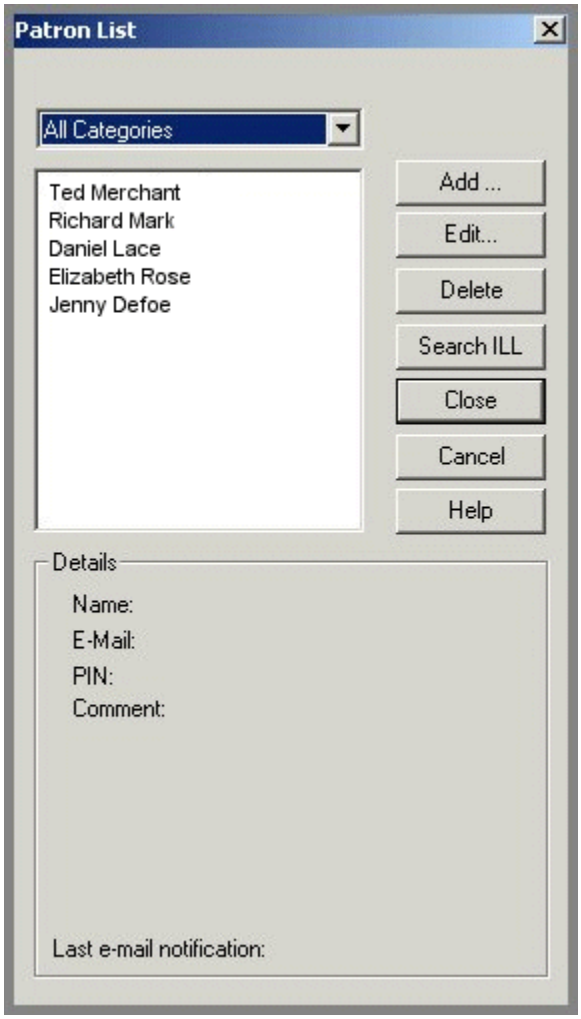
Step by Step

You can access, view, and delete the patron list using the Patron List window. You can create the patron details using the Add Patron Delivery Information window and modify the patron list details using the Update Patron Delivery Information window. In addition, you can also access and select a patron from the ILL patron database using the Select ILL Patron window.

Accessing the Patron List Window

To access the Patron List window:

Step 1. Select **Patron List → Entries...**. The Patron List window is displayed.



Step 2. Create and maintain the patron details as required.

Viewing Patron List Details

To view the patron list details:

Step 1. Select the relevant patron category from the drop-down list in the Patron List window. The list of patron names are displayed based on the patron category selected.

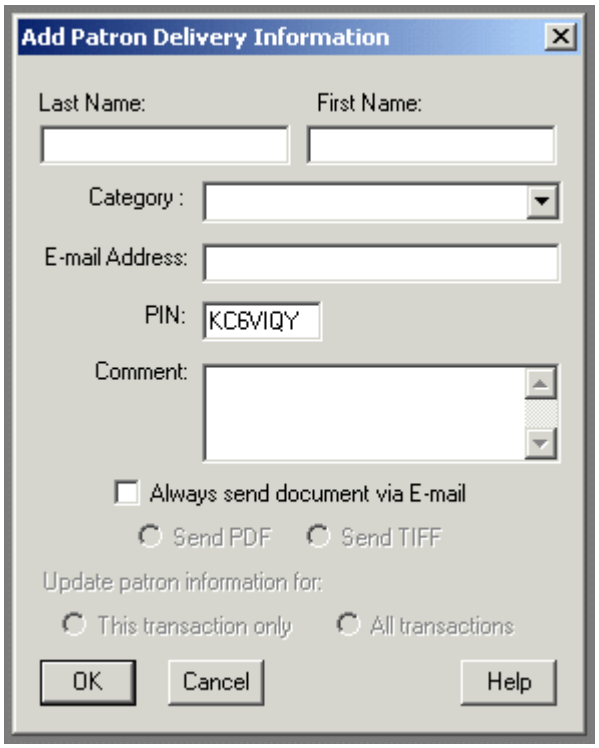
Step 2. Select a patron name from the List section.

Step 3. The details of the selected patron are displayed in the Details section.

Creating Patron List Details

To create patron list details:

Step 1. Click **Add** in the Patron List window. The Add Patron Delivery Information window is displayed.



Step 2. Enter the last name, first name, email address, and comment in the respective fields.

Step 3. Select the patron category from the drop-down list. The PIN number is automatically displayed in the PIN field.

Step 4. Select **Always send document via E-mail** check box if you want to send the document only through email.

Step 5. Select the format by which the document will be sent.

Step 6. Click **OK** to save and close the Add Patron Delivery Information window and return to the Patron List window.

Step 7. You can also click **Cancel** or to close the Add Patron Delivery Information window and return to the Patron List window without saving the details.

You can also add patron details from the Send window while sending documents to patrons.

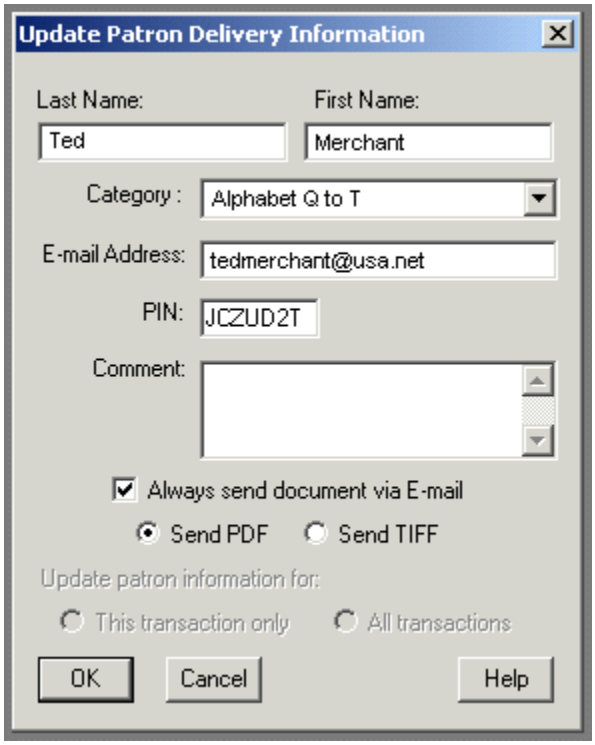
Modifying Patron List Details

To modify patron list details:

Step 1. Select the relevant category from the drop-down list in the Patron List window. The list of patron names are displayed based on the specific category selected.

Step 2. Select a patron name whose details you want to modify from the List section.

Step 3. Click **Edit**. The Update Patron Delivery Information window is displayed.



Step 4. Make the necessary changes.

Step 5. Click **OK** to save and close the Add Patron Delivery Information window and return to the Patron List window.

Step 6. You can also click **Cancel** or to close the Update Patron Delivery Information window without saving the changes and return to the Patron List window.

1. You can also modify patron details from the Send window while sending documents to patrons.

*2. You can edit only one patron at a time. An appropriate error message will be displayed if you click **Edit** after selecting more than one patron.*

Deleting Patron List Details

To delete patron list details:

Step 1. Select the relevant category from the drop-down list in the Patron List window. The list of patron names are displayed based on the category selected.

Step 2. Select a patron name you want to delete from the List section.

Step 3. Click **Delete**. A confirmation message for delete is displayed. Click **OK** to delete the patron details.

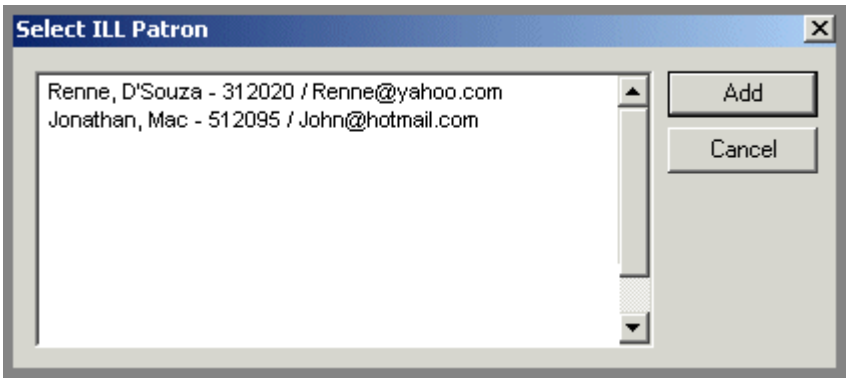
Step 4. You can also click **Cancel** or to cancel deletion.

Accessing Select ILL Patron window

To access the Select ILL Patron window

Step 1. Navigate to the Patron List window.

Step 2. Click **Search ILL**. The Select ILL Patron window is displayed.



Step 3. Select the required patron names.

Selecting Patrons from ILL Database

To select a patron

Step 1. Select the patron name from the list displayed in the Select ILL Patron window.

Step 2. Click **Add**. The Select ILL Patron window is closed and the Add Patron Delivery Information window is displayed with the details of the patron in the respective fields.

Step 3. Modify the details as required.

Step 4. Click **OK** to save and close the Add Patron Delivery Information window and return to the Patron List window. The patron name is added to in the List section of the Patron List window.

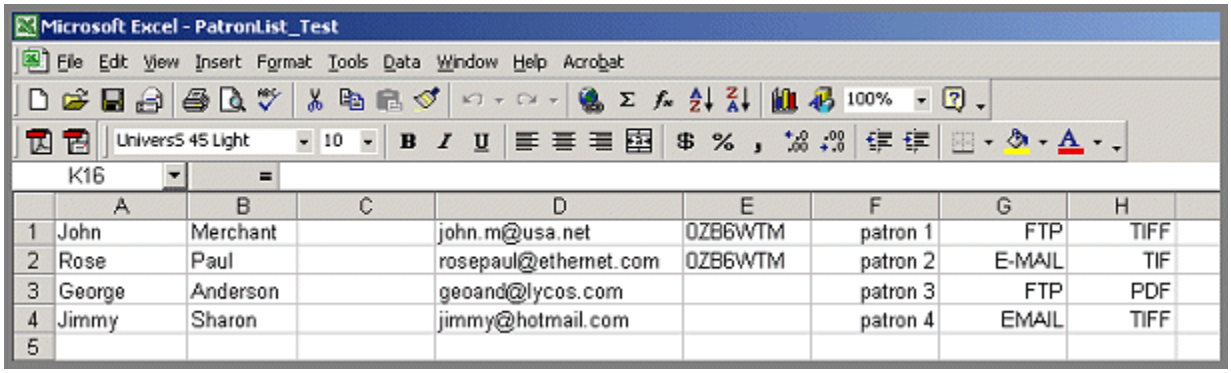
Step 5. Click **Close** or to close the Patron List window.

Importing Patron Lists

You can import the email addresses of patrons available in other applications such as Microsoft Outlook to Ariel. The address book from other applications or POP 3 clients can be exported in the CSV or Excel format and then imported to Ariel.

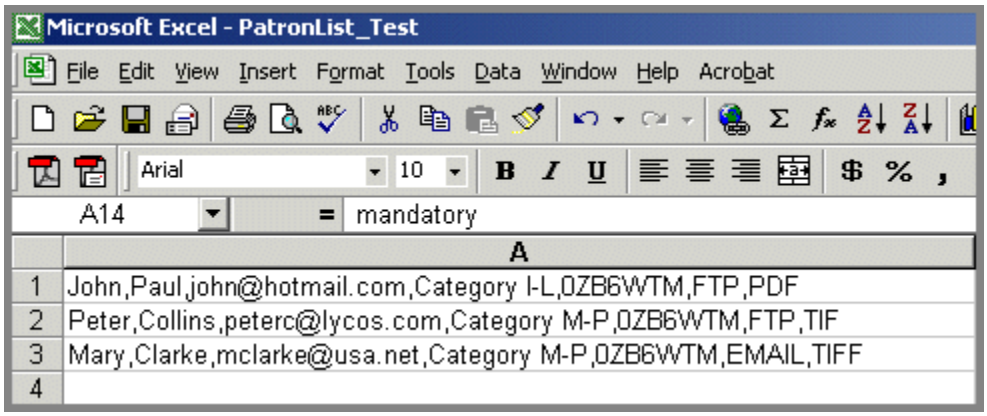
For importing patron list from Excel files, the details of the patron must be listed in a multi-column format. The details must contain information in at least three columns where Last name, email ID, and the category ID of the patron is specified. The first column must contain the last name of the patron; the second column must contain the first name of the patron; the third column must contain the category of the patron; and the forth column must contain the email address of the patron; the fifth column must contain the PIN number; the sixth column must contain the comments for the patron; the seventh column must contain the option for sending documents via email; the eighth column must contain the option for sending documents as either in the PDF or TIFF format. For sending documents via e-mail, you must specify the option as E-MAIL. You can also specify the FTP option if documents are to be sent through FTP. For receiving

documents in the TIFF format, you must specify the option as TIFF. You can also specify the PDF option for receiving documents in PDF format.



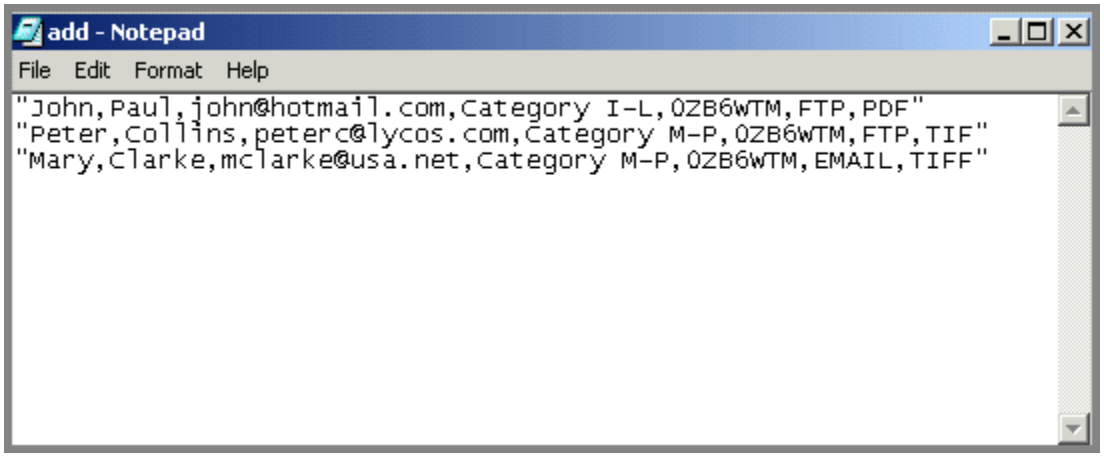
	A	B	C	D	E	F	G	H
1	John	Merchant		john.m@usa.net	0ZB6WTM	patron 1	FTP	TIFF
2	Rose	Paul		rosepaul@ethernet.com	0ZB6WTM	patron 2	E-MAIL	TIF
3	George	Anderson		geoand@lycos.com		patron 3	FTP	PDF
4	Jimmy	Sharon		jimmy@hotmail.com		patron 4	EMAIL	TIFF
5								

For importing addresses from CSV files, the details of the Ariel workstation must be listed in a single column format. All the field details must be separated by a comma and without any changes. The first detail must contain the last name of the patron; the second detail must contain the first name of the patron; the third detail must contain the category of the patron; and the forth detail must contain the email address of the patron; the fifth detail must contain the PIN number; the sixth detail must contain the comments for the patron; the seventh detail must contain the option for sending documents via email; the eighth detail must contain the option for sending documents as either in the PDF or TIFF format. For sending documents via e-mail, you must specify the option as E-MAIL. You can also specify the FTP option if documents are to be sent through FTP. For receiving documents in the TIFF format, you must specify the option as TIFF. You can also specify the PDF option for receiving documents in PDF format.



	A
1	John,Paul,john@hotmail.com,Category I-L,0ZB6WTM,FTP,PDF
2	Peter,Collins,peterc@lycos.com,Category M-P,0ZB6WTM,FTP,TIF
3	Mary,Clarke,mclarke@usa.net,Category M-P,0ZB6WTM,EMAIL,TIFF
4	

You can also save addresses in the notepad and save it as a CSV file. While storing the address details, it must be listed in a single column format. All the field details must be separated by a comma and without any spaces. The first detail must contain the last name of the patron; the second detail must contain the first name of the patron; the third detail must contain the category of the patron; and the forth detail must contain the email address of the patron; the fifth detail must contain the PIN number; the sixth detail must contain the comments for the patron; the seventh detail must contain the option of sending documents via email; the eighth detail must contain the option for sending documents as either in the PDF or TIFF format. You can also specify the FTP option if documents are sent through FTP. For receiving documents in the TIFF format, you must specify the option as TIFF. You can also specify the PDF option for receiving documents in PDF format.



While saving the notepad file, you must specify the file name with the .csv extension in double quotes. For example, "address.csv". The file will be saved in the CSV format that can be imported in Ariel.

1. While importing addresses from the CSV format, there should be no space between the fields and commas. The field must be separated only by commas.

2. The fields Last Name, E-mail Address, and Category are mandatory fields. The details to be imported must contain these three details.

3. If the patron list is not imported, an appropriate error message will be displayed.

Ariel will not overwrite an existing patron detail. If an existing patron's detail is imported, an error message will not be displayed and a new record with the same details will be created.

You can use the Open dialog box to import patron list.

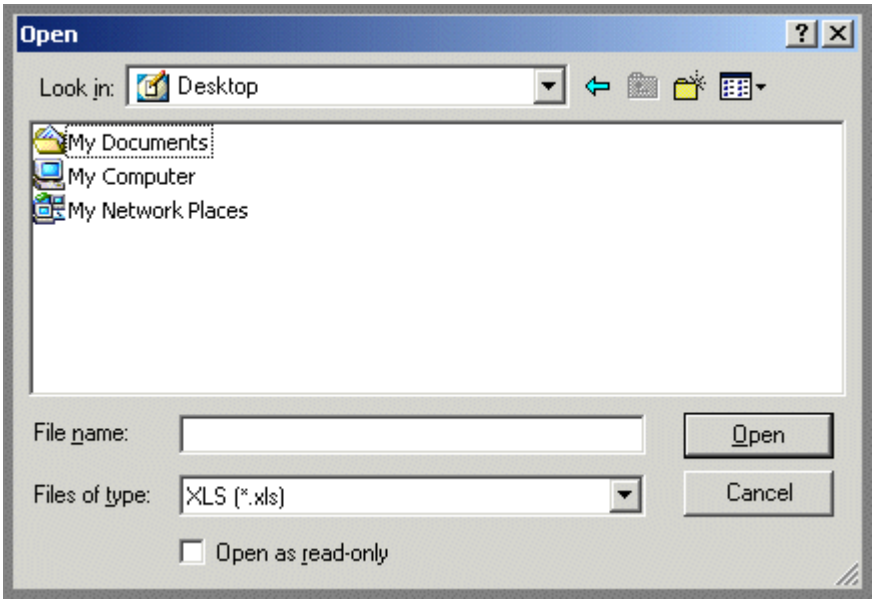
Step by Step

You can import addresses from an Excel and CSV file to Ariel using the Open dialog box.

Importing Patron Details in Excel Format

To import patron details that are available in Excel format:

Step 1. Select **Patron List → Get External Data → Import Excel File**. The Open dialog box is displayed.



Step 2. Select the location of the file.

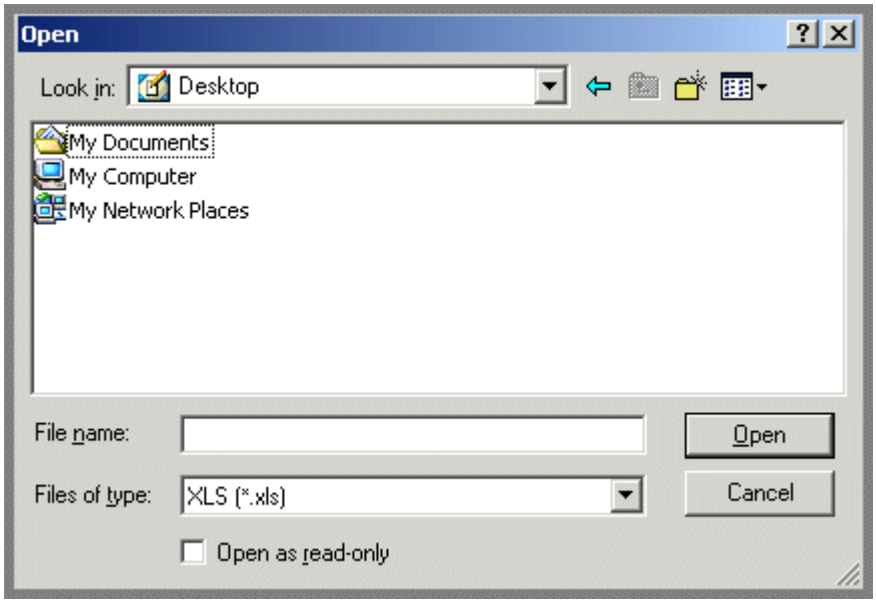
Step 3. Click **Open**. A message is displayed stating that the address details are successfully imported. The patron details in the Excel file are imported to the patron list.

Step 4. Click **OK**. The details of the imported patrons' names are displayed in the List section of the Patron List window.

Importing Patron Details in CSV Format

To import patron details that are available in CSV format:

Step 1. Select **Patron List → Get External Data → CSV Excel File**. The Open dialog box is displayed.



Step 2. Select the location of the file.

Step 3. Click **Open**. A message is displayed that the patron addresses are successfully imported. The patron details in the CSV file are imported to the patron list.

Step 4. Click **OK**. The details of the imported patrons' names are displayed in the List section of the Patron List window.

If the addresses in the file are not imported, an appropriate message will be displayed.

Managing Document Count

In Ariel, you can use the Tools feature to track and monitor the list of documents sent or received from Ariel workstations. You can identify the number of documents received or sent to other Ariel workstations or patrons and the documents that are saved in the Archive Queue window. The procedural and task related information for performing the task is discussed in the following section:

- Resetting Document Counter Details

Resetting Document Counter Details

In Ariel, the document counter indicates the total number of documents sent or received by an Ariel workstation.

You can manage documents in the different windows of Ariel and track and monitor the list of documents sent, received, or saved in the respective Queue windows. You can use the Document Counter window to track the number of documents saved, sent to Ariel workstations or patrons, and the number of documents received from other patrons or Ariel workstations from the last time the count was reset. Based on your access rights, you can view the document counter details.

You can use the Document Counter window to view and reset the document count. In addition, you can change the password for accessing the Document Counter window and reset the password to the default password using the Change Password window.

The command buttons in the Document Counter window are described in the following table:

Button	Used to
	Reset document count for all the Queue at the same time.
	Reset the document count for the Archive, Send, Delivery, and Received Queue window.

The command button in the Change Password window is described in the following table:

Button	Used to
	Reset the password to the default password specified for accessing the Document Counter window.

Field Descriptions

The fields in the Password Confirmation window are described in the following table.

Field Name	Field Description
Enter Password	The password to access the Document Counter window.

The fields in the Document Counter window are described in the following table.

Field Name	Field Description
Work Station	The Internet Protocol address of the Ariel workstation for which the document count details have to be viewed or reset. You can select the required Internet Protocol address from the drop-down list. By default, the Internet Protocol address of your system will be displayed. If you select 'All', the window will display the document count details of all documents from all Ariel workstations connected to the network.
Archive	
Document count	Displays the total number of documents saved since the last reset of document count.

Field Name	Field Description
Send	
Document count	Displays the total number of documents sent to Ariel workstations since the last reset of document count.
Delivery	
Document count	Displays the total number of documents sent to patrons since the last reset of document count.
Receive	
Document count	Displays the total number of documents received since the last reset of document count.

The fields in the Change Password window are as follows:

Field Name	Field Description
Old password	The existing password to access the Document Counter window. This is a mandatory field.
New password	The new password to access the Document Counter window. This is a mandatory field.
Confirm password	Enter the new password again to confirm change of password. This is a mandatory field.

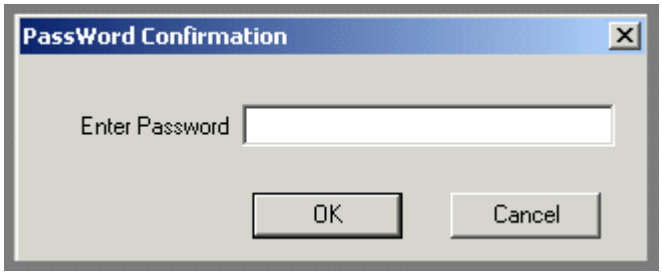
Step by Step

You can view and reset the document count using the Document Counter window. You can access and change the password to access the document counter window using the Change Password window.

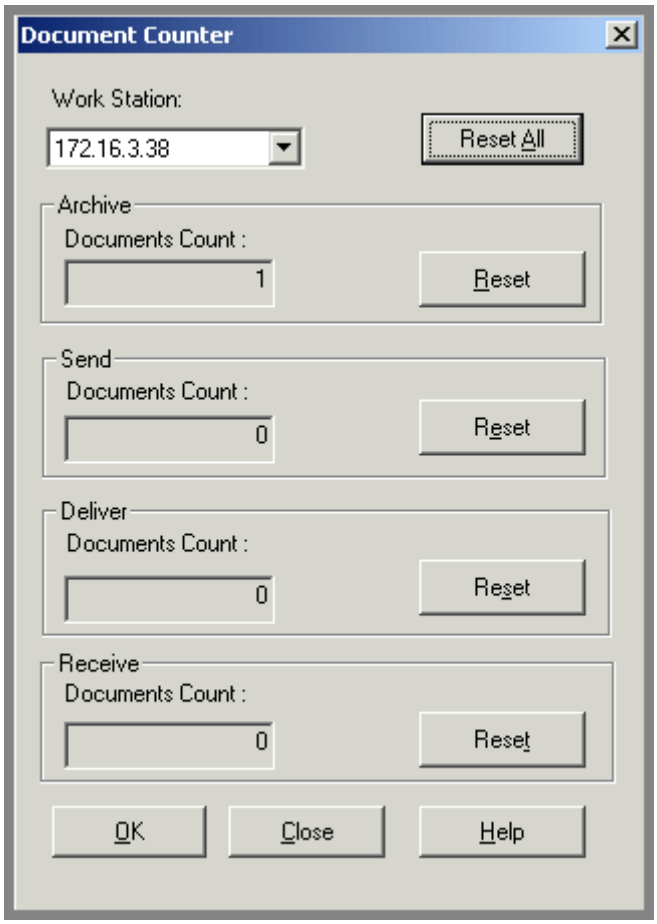
Accessing the Document Counter Window

To access the Document Counter window:

Step 1. Select **Tools → Document Counter**. The Password Confirmation window is displayed.



Step 2. Enter the password and click **OK** or press the **Enter** key on your keyboard. The Document Counter Window is displayed.



Step 3. Manage the document counter details as required.

Viewing Document Counter Details

To view the document counter details:

Step 1. Select the specific Internet Protocol address of an Ariel workstation for which you want to view the document counter details from the Work Station field in the Document Counter window.

Step 2. The number of documents in the Archive, Send, Delivery, Receive Queue windows since the last reset of document count are displayed in the respective Document Count fields.

Step 3. Click **Close** or to close the Document Counter window.

Resetting Document Counter Details

To reset the document counter details:

Step 1. Select the specific Internet Protocol address of an Ariel workstation for which you want to reset the document counter details from the Work Station field in the Document Counter window.

Step 2. Click **Reset** in the Archive, Send, Deliver, or Received section. The document count is reset to zero (0) in the respective section. You can also click **Reset All** to reset the document counts for all the Queue windows.

Step 3. The application will ask for a confirmation to reset the document count. Click **Yes** to reset the document count. Click **Cancel** if you do not want to reset the document count.

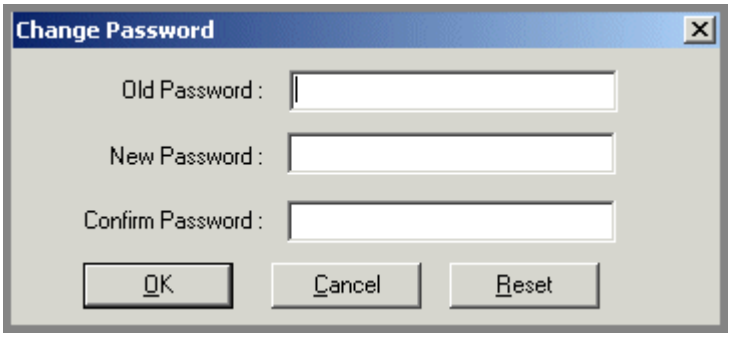
Step 4. Click **OK** to save.

Step 5. Click **Close** or to close the Document Counter window.

Accessing the Change Password Window

To access the Change Password window:

Step 1. Select **Tools → Password**. The Change Password window is displayed.



Step 2. Change the password as required.

Changing Password

To change the password:

Step 1. Enter the old password.

Step 2. Enter the new password of your choice.

Step 3. Enter the password again to confirm the password change.

Step 4. Click **OK** to confirm and save the password and close the Change Password window.

Step 5. You can also click **Cancel** or to close the Change Password window without saving the password.

*You can click **Reset** to change the password to the default password. A message will be displayed that the password has been successfully changed to the default value.*

Chapter 4. Document Management

Document Management discusses the activity of managing documents such as sending, delivering, receiving, and archiving scanned documents using Ariel.

This chapter provides procedural and task related information for sending, delivering, receiving, and archiving scanned documents. In addition, it discusses about the common tasks that you can perform using Ariel. It consists of the following sections:

- Overview
- Scanning Documents in Ariel
- Common Tasks in Document Management
- Managing Documents in Send Queue Window
- Managing Documents in Delivery Queue Window
- Managing Documents in Received Queue Window
- Managing Documents in Archive Queue Window

Overview

Libraries have a collection of documents, books, manuals, and periodicals related to various fields such as health, education, science, sports, politics, and historical events, which are maintained as hard copies for reference or study. When items in a library are maintained in hard copies, exchange of documents between libraries becomes difficult. In order to share documents between libraries, electronic copies are created and maintained using various methods such as microfilming and scanning.

Different software programs are used for scanning the hard copies and sharing them between libraries. Ariel can be used for electronic transfer of documents between public libraries or institutions. The application can be used effectively for transferring documents between different Ariel workstations and patrons. The systems where Ariel is installed and are used by the customers are termed Ariel workstations. Patrons are those who do not have Ariel installed in their system but can receive documents from Ariel workstations through SMTP as emails and FTP.

In Ariel, the electronic transfer is supported through e-mails, FTP, and SMTP modes. You can manage the document exchange and identify the status of the document that is sent, delivered, and received. If a document is not received by the recipient location due to errors or network problems, sufficient retries will be done automatically by the application. The documents can be saved and images of documents can be imported from external locations or folders. The procedural and task related information for managing documents are described in the following sections.

Scanning Documents in Ariel

In Ariel, you can scan documents and send them to Ariel workstations or patrons. You can use the Scan feature in Ariel to select the scanner driver and the scanner. You can also set up various scanner options to scan documents. You can rescan a page if required. The procedural and task related information for performing the task is discussed in the following section:

- Scanning Documents

Scanning Documents

You can scan the pages of a document using the Scan window and send it to an Ariel workstation or a patron. This window can be accessed by selecting **Scan** from the **Document** menu or by right-clicking and selecting **Scan** from the shortcut menu. You can also access this window by clicking in the toolbar.

You can select the scanner and set up the scanner settings and advanced scanner settings before scanning documents. For more information on setting up scanner settings see "Setting Up Scan Options." You can also set up the scanner options using the Scan window. In addition, you can rescan the current image if the image is not properly scanned.

From the Scan window, you can send documents directly to Ariel workstations or patrons or save the scanned document in the Archive Queue window by selecting the required option in the Disposition field of the Scan window. The documents sent to Ariel workstations will be displayed in the Send Queue window. The documents sent to patrons will be displayed in the Delivery Queue window and the documents saved will be displayed in the Archive Queue window.

The window elements in the Scan window are described in the following table.

Element	Used to
Scan	Scan pages of a document.
End	Complete the scanning.
Rescan	Rescan a page of a document.
View	View a page of a scanned document.
Print Page	Print the scanned page of a document.
More	Set up advanced scanner settings before scanning a page of a document. For more information see "Setting Up Advanced Scanner Settings." Note: The dialog specific to the default scanner driver and scanner selected in the **Scan** tab of the Preferences window will be displayed. You can change the scanner setting for a specific page if required using this button.
Restore Defaults	Set the default scan settings.

Field Descriptions

The fields in the Scan window are described in the following table.

Field Name	Field Description
Scanner Settings	
Dither	The dither option that can be selected for scanning the document. You can select the required option from the drop down list. This field will be enabled or disabled based on the default color format selected in the **Scan** tab of the Preferences window. Dithering is a technique used in computer graphics to create additional colors and shades from an existing palette by varying the proportion of different colors. In monochrome display, gray areas are created by varying the proportion of black and white pixels. In color displays, colors and textures are created by varying proportions of existing colors. There are three types of dithers, viz. - Regular, Random, and Pseudo random. The default value displayed in this field is based on the value selected in the Dither field in the **Scan** tab of the Preferences window.
Paper Size	The size of the paper that is scanned. You can select a required paper size from the drop-down list. The default value displayed in this drop-down list is based on the paper size selected in the **Scan** tab of the Preferences window.

Field Name	Field Description
Brightness	The extent of brightness used while scanning the document. You can use the horizontal scroll bar to adjust the brightness as required. This field will be enabled or disabled based on the scanner selected.
Resolution	The resolution that will be used when the documents are scanned. You can select a required resolution from the drop-down list. The default value displayed in this drop-down list is based on the resolution selected in the **Scan** tab of the Preferences window.
Contrast	The extent of contrast used while scanning documents. You can use the horizontal scroll bar to adjust the contrast as required. This field will be enabled or disabled based on the default contrast preferences set in the **Scan** tab of the Preferences window.
Format	The color format used for scanning a document. You can select a required format from the drop-down list. The default value displayed in this drop-down list is based on the color format selected in the **Scan** tab of the Preferences window.

Field Name	Field Description
Auto Scan Mode	Select this check box to automatically scan all the pages of the document. When you select this check box, all the pages will be scanned automatically and the respective Send, Save, or Send to Patron window will be displayed based on the option selected in the Disposition field. If this check box is not selected, you need to click **Scan** every time to scan each page of the document.
Auto Scan Preview	Select this check box to automatically display each page of the scanned document. The scanned page will be displayed on the right side of the Scan window. This check box will be enabled only if the **Auto Scan Mode** check box is selected.

Field Name	Field Description
Disposition	The different modes used for sending and saving the scanned documents. You can select a required mode from the following options: Scan then Send: To scan and send a document to another Ariel workstation. When you select this option, you can select the name of the Ariel workstation and the Internet Protocol address to send documents to Ariel workstations. 2. Scan and Save: To scan and save a document in the Archive Queue window. When you select this option, you can specify the document ID and the file name to save the document. The document details will be displayed in the Archive Queue window. 3. Scan and Send to Patron: To scan and send the document to a specific patron. When you select this option, you can select the patron category and the address and specify the document ID to send the document to a patron. The details of the document will be displayed in the Delivery Queue window.
Pages scanned	Displays the number of pages scanned.

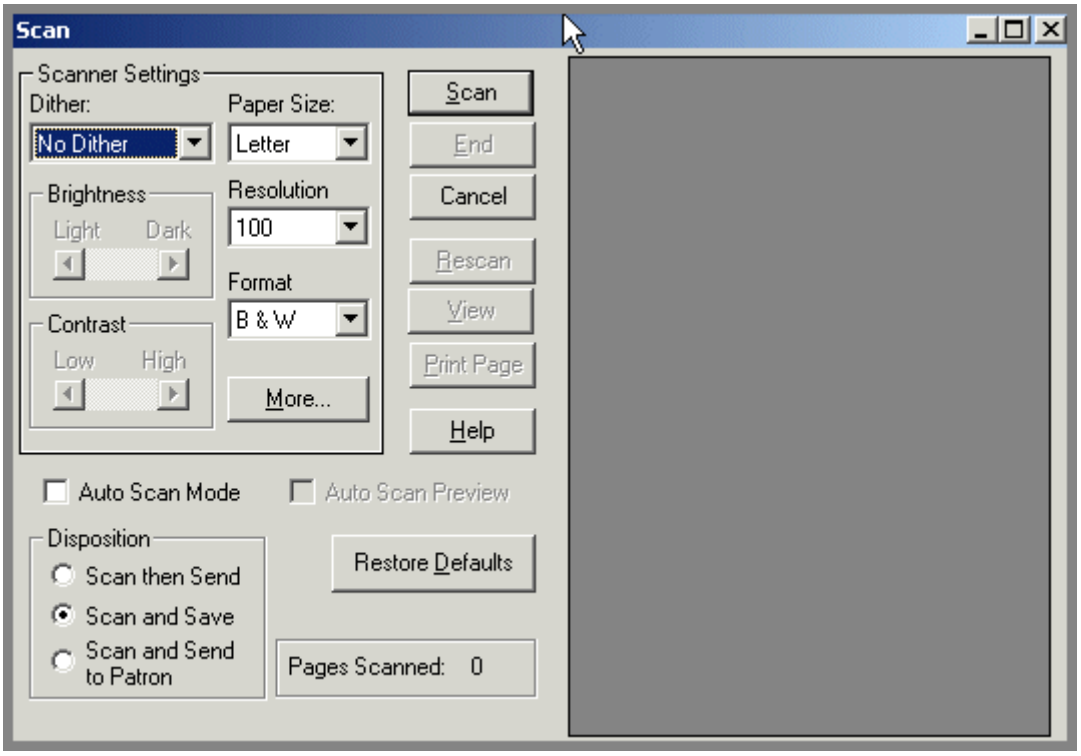
Step by Step

You can scan the pages of a document using the Scan window. Advanced scanner settings can be set up to scan specific pages of a document. You can also rescan the pages of a document if required.

Accessing the Scan Window

To access the Scan window:

Step 1. Select **Document → Scan**. The Scan window is displayed.



Step 2. Select the required options and scan the pages of the document as required.

Scanning Documents

To scan a document:

Step 1. Select the required scanning options.

Step 2. Select the **Auto Scan Mode** check box if you want to automatically scan the pages of the document.

Step 3. Select the **Auto Scan Preview** check box if you want to view the scanned page.

Step 4. Select the required option from the Disposition field.

Step 5. Click **Scan**. The End, Rescan, View, and Print Page buttons are enabled. A message is displayed stating that the specific page of the document is

being scanned. After the page is scanned, its preview is displayed.

Step 6. Adjust the brightness and contrast settings as required.

Step 7. Click **End** when you have scanned all the pages of the document. Based on the option you have selected in the Disposition field, the Send, Save, or Send to Patron window is displayed.

Step 8. Enter the relevant details in the respective windows and click **OK** to close the respective window. The document is sent or saved in the respective Queue windows.

*You can click **More** in the Scan window to set up advanced scanner setting options for scanning specific pages of a document which require a different scanner from the default scanner used for scanning your documents.*

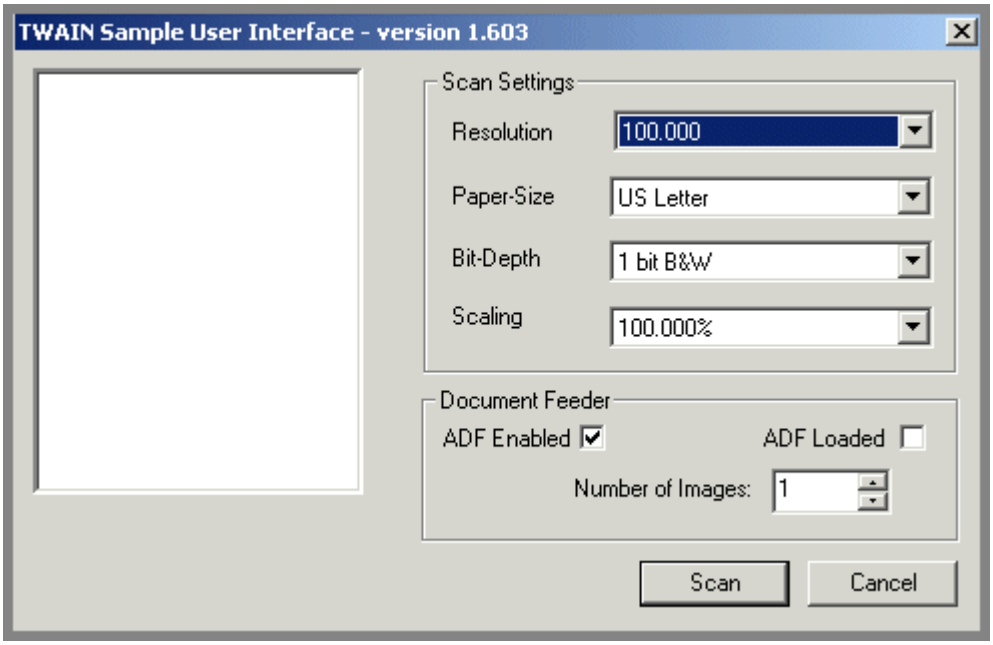
Setting Up Advanced Scanner Settings

To set up advanced scanner settings for scanning specific pages of a document:

Step 1. Click '**More'** in the Scan window.

Step 2. Click **Scan.** Based on the scanner driver and scanner you have selected, the appropriate scanner settings window is displayed. For example, if you have selected TWAIN as your scanner driver, the

Twain Sample User Interface scanner settings window is displayed.



Step 3. Select the required resolution, paper size, bit depth, and scaling.

Step 4. Select the required document feeder by selecting the respective check box.

Step 5. Enter the number of images.

Step 6. Click **Scan**. The specific page of the document is scanned based on the settings you have specified in this window. A message is displayed that the document is being scanned. You can also click **Cancel** to cancel scanning of a page.

Step 7. You can also click **Cancel** to cancel the advanced scanner settings.

Rescanning Pages of a Document

To rescan a page of a document:

Step 1. Click **Rescan** in the Scan window. A message is displayed that the specific page is scanned again and the page number of the rescanned page is displayed in the Pages Scanned field.

Common Tasks in Document Management

In Ariel, when you are scanning and sending documents, you will perform other related tasks. Some of the tasks are common across all windows of Ariel. For example, the method of adding bibliographic details and viewing document details are common to all windows. The following sections describe the various common tasks in Ariel.

- Viewing Scanned Pages of a Document
- Holding Documents
- Releasing Documents
- Saving Documents in the Archive Queue Window
- Deleting Documents
- Importing and Saving Documents
- Importing and Sending Documents to Ariel Workstations
- Importing and Sending Documents to Patrons
- Setting Up Log Options
- Viewing Log Entries
- Setting Up Print Options
- Printing Documents
- Viewing Document Transfer Status
- Creating and Maintaining Bibliographic Details

Viewing Scanned Pages of a Document

You can view the pages of a scanned document in the Send, Delivery, Received, and Archive Queue windows. You can use the View Document window to view the pages of a document. You can directly access this window by selecting a specific document from any of the Queue windows and selecting **View** from the **Document** menu. You can also view a specific page of a document by right-clicking the document and selecting **View** from the shortcut menu. The pages of a document can also be viewed by clicking **View** in the Scan window. The View Document window can also be accessed by clicking in the toolbar. When this window is accessed, the page number of the currently accessed page and the total number of pages scanned will be displayed.

The window elements in the View Document window are described in the following table.

Element	Used To
Close	Close the View Document window.
Print	Print a specific page of a document, which is currently viewed. A message will be displayed stating that the specific page is printed.
Help	View the help topic.
Zoom In	Increase the size of the page display to get a close-up view of the page.
Zoom Out	Reduce the size of a page display to view more details of a page.
Rotate...	Rotate the page. The Rotate Page window will be displayed. You can select the required option and click **OK** to rotate the page.

Element	Used To
Best Fit	View a complete page of a scanned document.
Fit To Width	Fit the specific page in a document to the width of the viewing window.
Next Page	View the next page of the document.
Previous Page	View the previous page of the document.
Go To Page...	Navigate to a specific page of the document. When you click this button, the Go To Page window will be displayed. You can specify the page number you want to view and click **OK** to navigate to the specific page.
Thumbnail View	View multiple pages of a scanned document in compressed view. When you click this button, the Thumbnail window will be displayed with the multiple pages of the document. You can click a specific page or press the **Shift** key and click on a specific page to view the enlarged image of the page.
Replace Page	Replace pages in a scanned document. For example, on viewing page 1, if you click this button, the Replacing Page 1 window will be displayed using which you can scan and replace the specific page with a newly scanned page. In this window, the same fields as in the Scan window will be displayed. For more information on fields, see "Field Descriptions" given in Scanning Documents.

Element	Used To
Insert Page	Insert pages in a document. For example, on viewing page 1, if you click this button, the Inserting Page 1 window will be displayed using which you can insert a specific page. In this window, the same fields as in the Scan window are displayed. For more information on fields, see "Field Descriptions" given in Scanning Documents.
Delete Page	Delete pages in a document. When you click this button, a confirmation message for delete will be displayed. You can click **Yes** to delete the specific page or click **No** to cancel deletion.
Crop Image	Remove a part of a image or unwanted sections or extra white spaces in the scanned document.

Step by Step

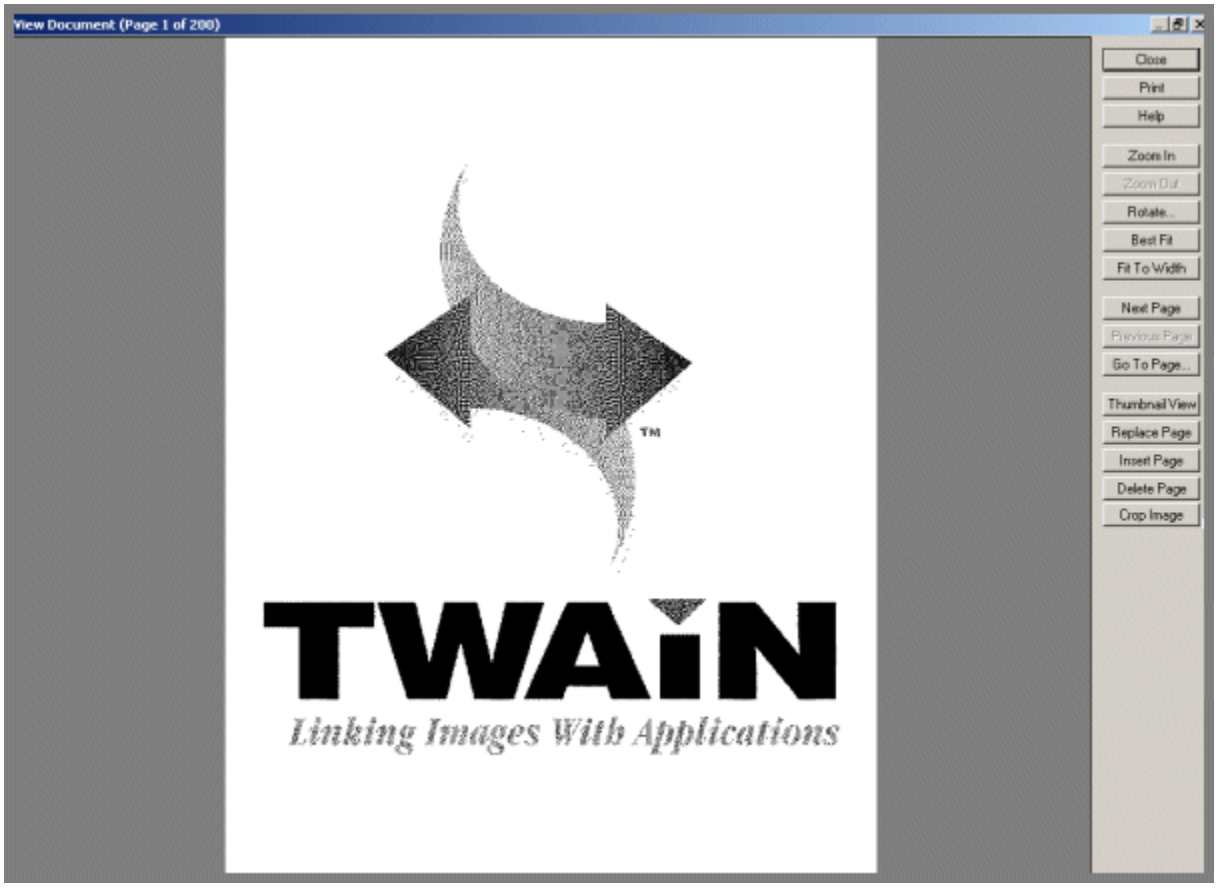
You can view, navigate, and rotate images of documents, replace, insert, delete, and print pages of a document using the View Document window. In addition, you can crop the image of a page of document if required.

Accessing the View Document Window

To access the View Document window:

Step 1. Select a specific document you want to view from the Send, Delivery, Received, or Archive Queue window.

Step 2. Select **Document → View**. The View Document window is displayed.



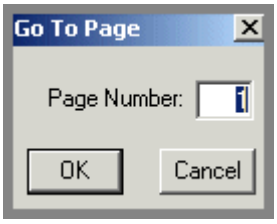
Step 3. View, print, or save the document as required.

*When you click any of the command buttons in the View document window and perform specific tasks, a message prompts you to save the changes. Click **Yes** to update the changes or click **No** to cancel it. For example, if you click **Rotate Page** and then click **Next**, a message will be displayed asking you to save the page.*

Navigating to a Page in a Document

To navigate to a specific page of a document:

Step 1. Click **Go To Page** in the View Document window. The Go To page window is displayed.



Step 2. Enter the page number of the document you want to view.

Step 3. Click **OK**. The Go To Page window is closed and the specific page is displayed in the View Document window. The page number of the document is displayed next to the window name.

Step 4. You can also click **Cancel** to cancel page navigation and return to the View Document window.

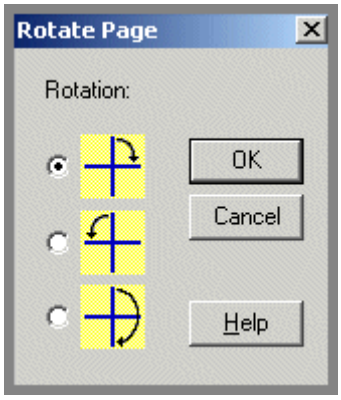
Step 5. Click **Close** to close the View Document window.

Rotating Pages

To rotate a page:

Step 1. Navigate to the page you want to rotate.

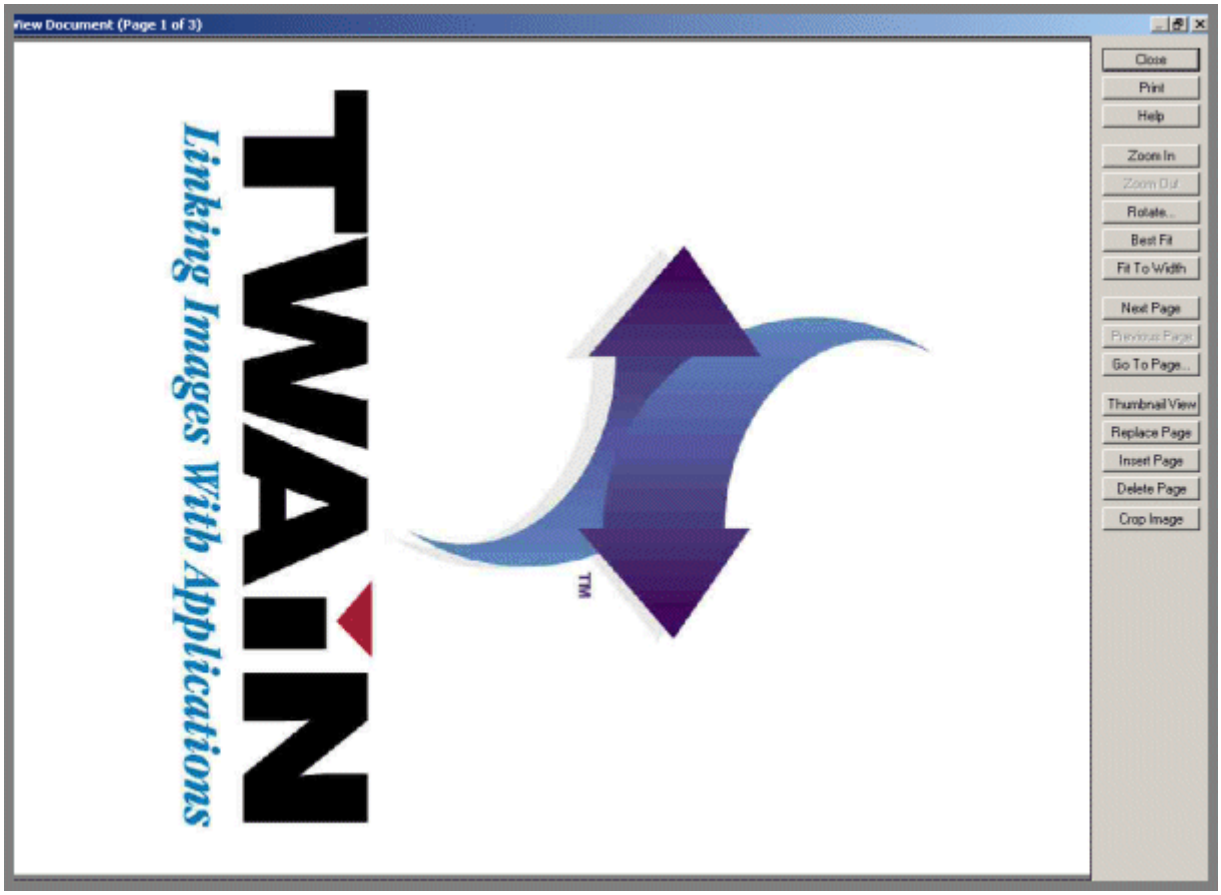
Step 2. Click **Rotate**. The Rotate Page window is displayed.



Step 3. Select the required option in the Rotation field.

Step 4. Click **OK**. A message is displayed stating whether you want to rotate all the pages of the document.

Step 5. Click **Yes** to rotate all the pages of the document or click **No** to rotate only the current page. The Rotate Page window is closed and the orientation of the image is changed based on the rotation option selected.



Step 6. Click **Cancel** to close the Rotate Page window and return to the View Document window.

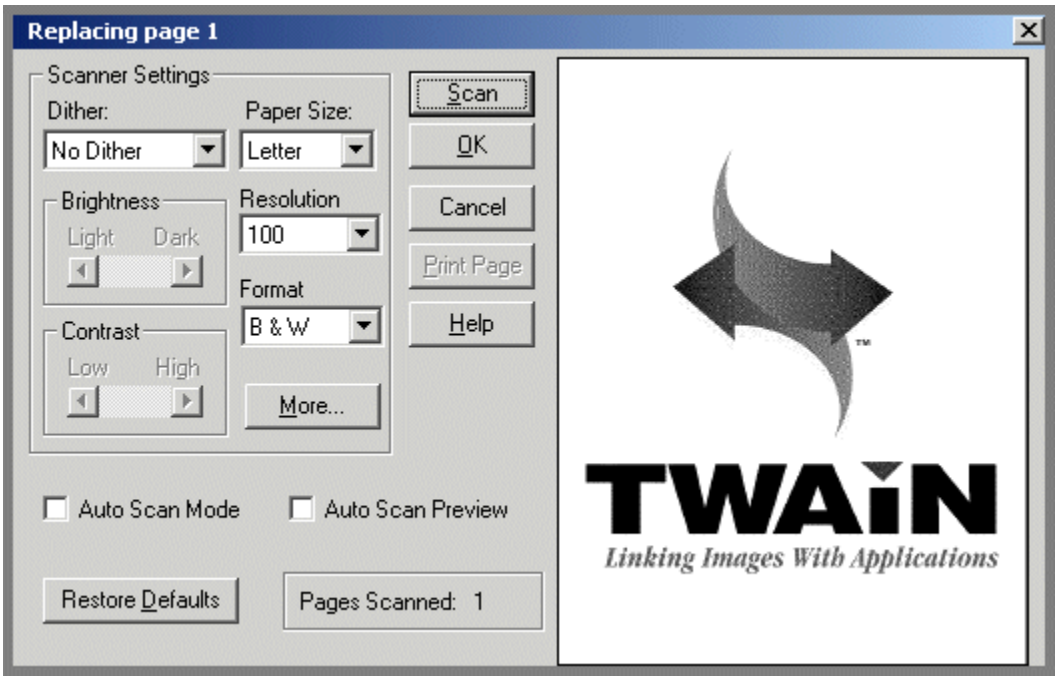
Step 7. Click **Close** to close the View Document window.

Replacing Pages in a Document

To replace a specific page of a document:

Step 1. Navigate to the page you want to replace.

Step 2. Click **Replace Page**. The Replacing page window is displayed with the page number.



Step 3. Select the required scanner options.

Step 4. Click **Scan**. The specific page is replaced with the currently scanned page.

Step 5. Click **OK** to close the window and return to the View Document window. You can also click **Cancel** to cancel replacing of pages and close the Replacing page window.

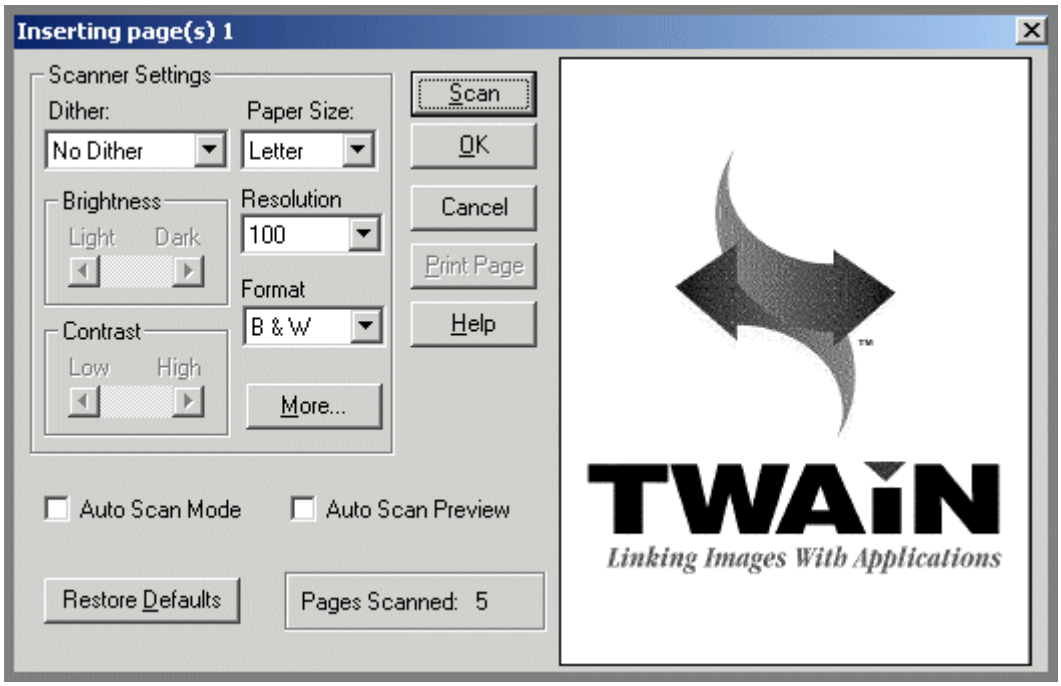
Step 6. Click **Close** to close the View Document window.

Inserting Pages in a Document

To insert a page in a document:

Step 1. Navigate to a specific page from which you need to insert a page.

Step 2. Click **Insert Page**. The Insert page (s) window is displayed with the page number.



Step 3. Select the required scan options.

Step 4. Click **Scan**. The scanned page is inserted before the selected page.

Step 5. Click **OK** to close the Inserting page window and return to the View Document window.

Step 6. You can also click **Cancel** to cancel page insertion and return to the View Document window.

Step 7. Click **Close** to close the View Document window.

Deleting Pages of a Document

To delete a page in a document:

Step 1. Navigate to the page you want to delete in the View Document window.

Step 2. Click **Delete Page**. A confirmation message for page deletion is displayed.

Step 3. Click **Yes** to delete the page or click **No** to cancel the deletion.

Step 4. Click **Close** to close the View Document window.

Printing Pages of a Document

To print pages of a document:

Step 1. Navigate to the page you want to print in the View Document window.

Step 2. Click **Print**. A message is displayed that the document is printed. You can also click **Cancel** to cancel printing.

Step 3. Click **Close** to close the View Documents window.

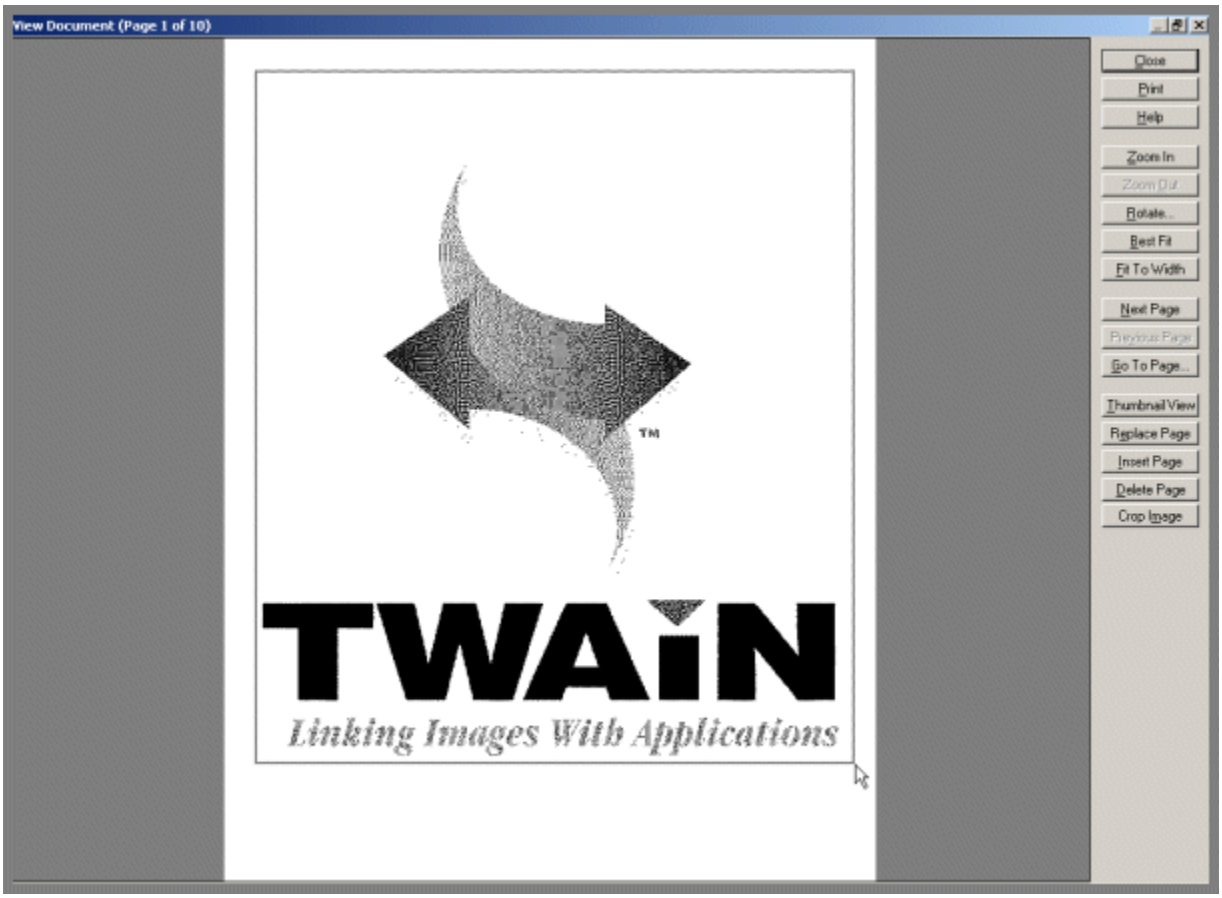
*You can click **Thumbnail View** to view multiple pages and click **Print** to print multiple pages of the document.*

Cropping Image of a Page

To crop the image of a page of a document:

Step 1. Navigate to the page you want to crop in the View Document window.

Step 2. Place the cursor on the page and drag it to select the required part of the image to be cropped.



Step 3. Click **Crop Image**. The extra-unwanted white spaces are removed.

Step 4. Click **Close**. A confirmation message for save is displayed. Click **Yes** to save and close the View Document window. You can also click **No** to close the window without saving the image.

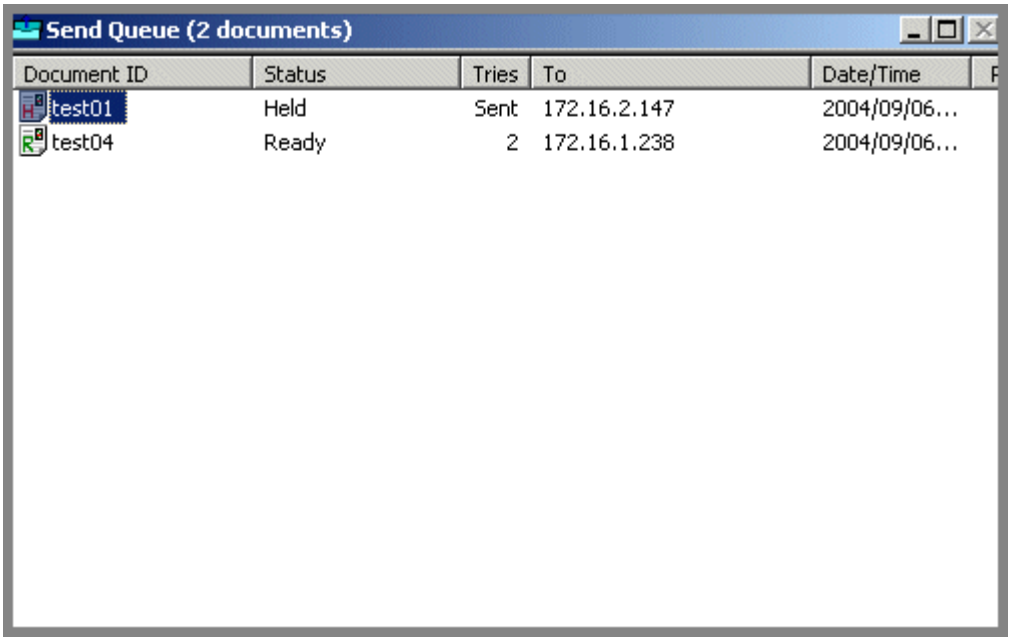
Step 5. Click **Close** to close the View Documents window.

Holding Documents

You can hold a document in the Send and Delivery Queue windows so that other documents can be sent or posted to the designated address. Similarly you can hold the document in the Received Queue window to suspend automatic printing. When you hold a document, the status will be changed to 'Held" and indicated by before the Document ID field. The documents will stay in their current Queue windows until you release or delete them.

You can select and hold all the documents in a specific Queue window by pressing the Shift key and selecting specific documents. Documents will stay in the current Queue window until you release or delete them.

To hold a document in the Send, Received, and Delivery Queue windows, you can select a specific document and select **Hold** from the **Document** menu. You can also select the document and right-click and select **Hold** from the shortcut menu or click in the toolbar to hold a document.



Step by Step

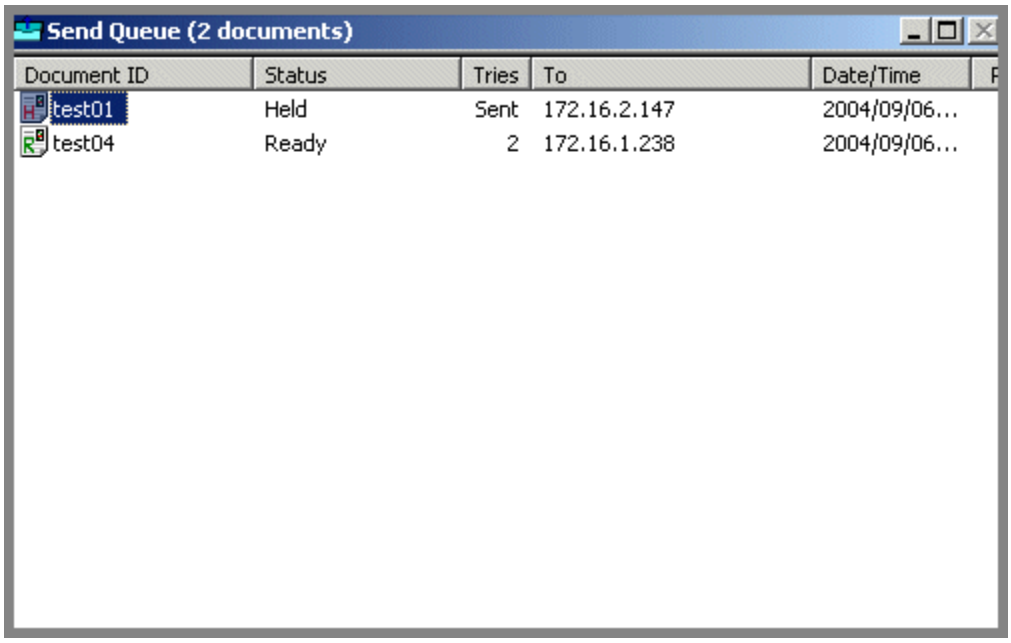
You can hold a document in the Send, Received, and Delivery Queue windows.

Holding Documents

To hold a document in a specific Queue window:

Step 1. Select the document that you want to hold from the required Queue window.

Step 2. Select **Document → Hold**. The status of the selected document changes to 'Held'.

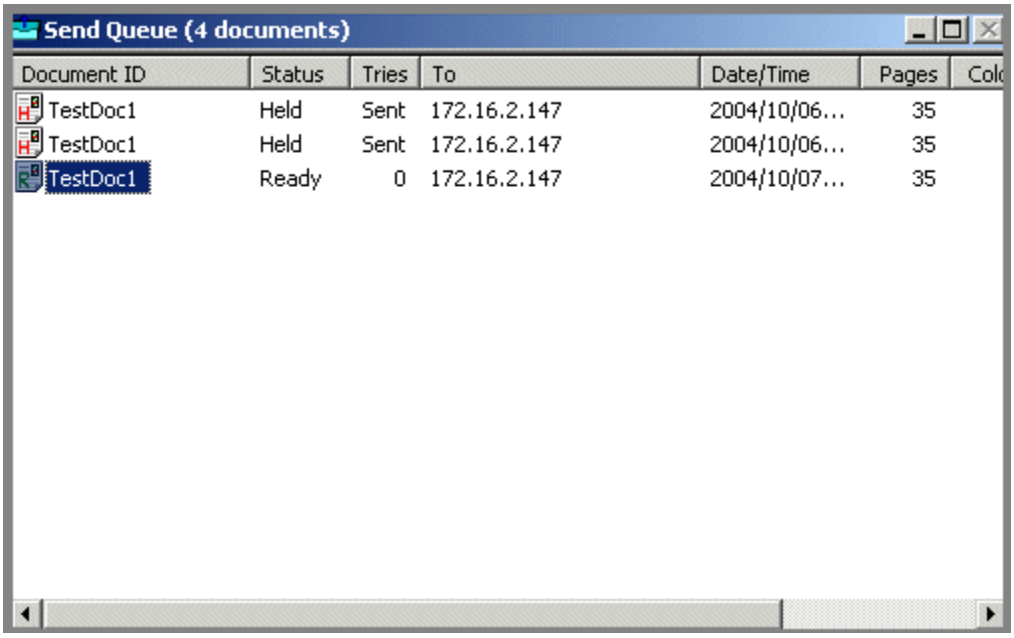


Releasing Documents

You can release a document whose status is 'Held" in the Send, Received, and Delivery Queue windows. When you release a document, the status of the document will be changed to 'Ready' and indicated by . Once the status of the document is changed to 'Ready', the document will be sent or posted to the specific destination after passing through the various statuses in the respective Queue windows.

To release a document, you can select a specific document whose status is 'Held' and select **Release** from the **Document** menu. You can also select a

document and right-click and select **Release** from the shortcut menu or click in the tool bar to release a document.



Step by Step

You can release a document whose status is 'Held' in the Send, Received, and Delivery Queue windows.

Releasing Documents

To release a document:

Step 1. Select the document that you want to release from the required Queue window.

Step 2. Select **Document → Release**. The status of the selected document is changed to 'Ready'.

When a document is released in the Send Queue window, the icon before the Document ID field will be highlighted in yellow indicating that the document is active. Once the document is released, the status of the document will automatically change to 'Ready'.

Saving Documents in the Archive Queue Window

You can save the document from the Send, Received, or Delivery Queue windows to the Archive Queue window. The documents that are saved in the Archive Queue window can be exchanged between other Ariel workstations when documents are not available in a specific Ariel workstation.

You can select a document in a Queue window and select **Save** from the **Document** menu to save it. You can also select a document and right-click and select **Save** from the shortcut menu or click in the toolbar to save a document. The document is automatically saved in the Archive Queue window.

When a document with the same file name is saved, a message that the file name already exists and whether you want to overwrite the file will be displayed. If you click **No** in the message box, the Save window will be displayed using which you can save the document in the Archive Queue window with a different file name.

You can also save a document by selecting the **Send and Save** option in the Disposition field and clicking **End** in the Scan window. When this option is selected, the document is automatically saved in the Archive Queue window after the scanning is completed.

The window elements in the Save window are described in the following table.

Element	Used to
	Add or modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."
	View the transaction details of a document.
	To select a patron name from the patron list.

Field Description

The fields in the Save window are described in the following table.

Field Name	Field Description
Header Information	
Document ID	The title or phrase that identifies a document. This is a mandatory field.
Patron	The name of the patron to whom the document is sent.
Note	Any additional remark or comment about the document.
Archive Entry Identification	
File Name	A unique file name given to the document when the document is saved in the Archive Queue window. Note: 1. File name can be more than 8 characters. The file name cannot use characters that are invalid for DOS file names. 2. Ariel automatically assigns the extension .ARV for archive files. This is a mandatory field.
Description	The description given to a file name.

Step by Step

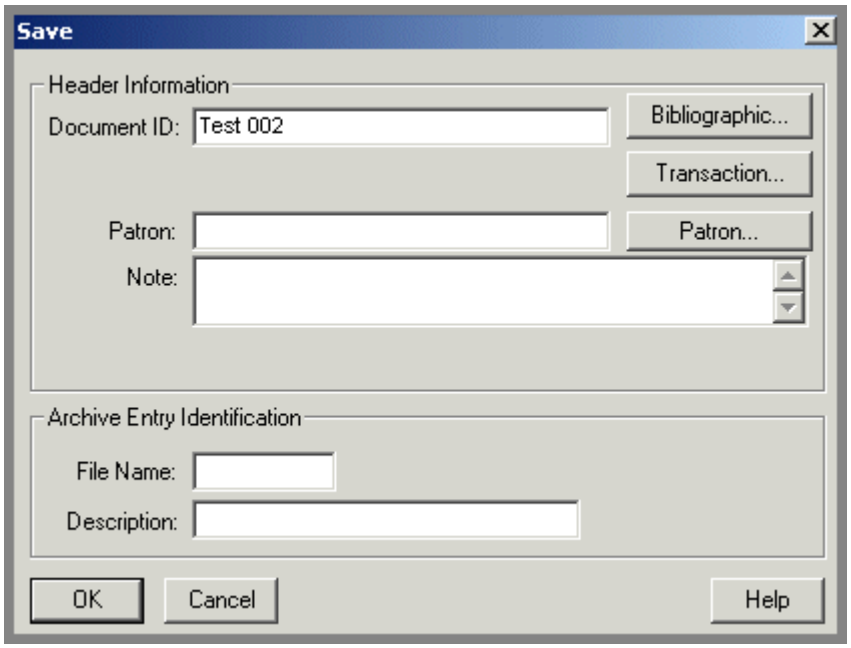
You can save documents to the Archive Queue window using the Save window.

Accessing the Save Window

To access the Save window:

Step 1. Select the document you want to save from the respective Queue window.

Step 2. Select **Document → Save**. The Save window is displayed.



Step 3. Save the documents as required.

1. The Save window opens only when a document with the same file name is saved.

2. You can also edit the bibliographic information and view document transaction details by clicking the Bibliographic and Transaction buttons respectively.

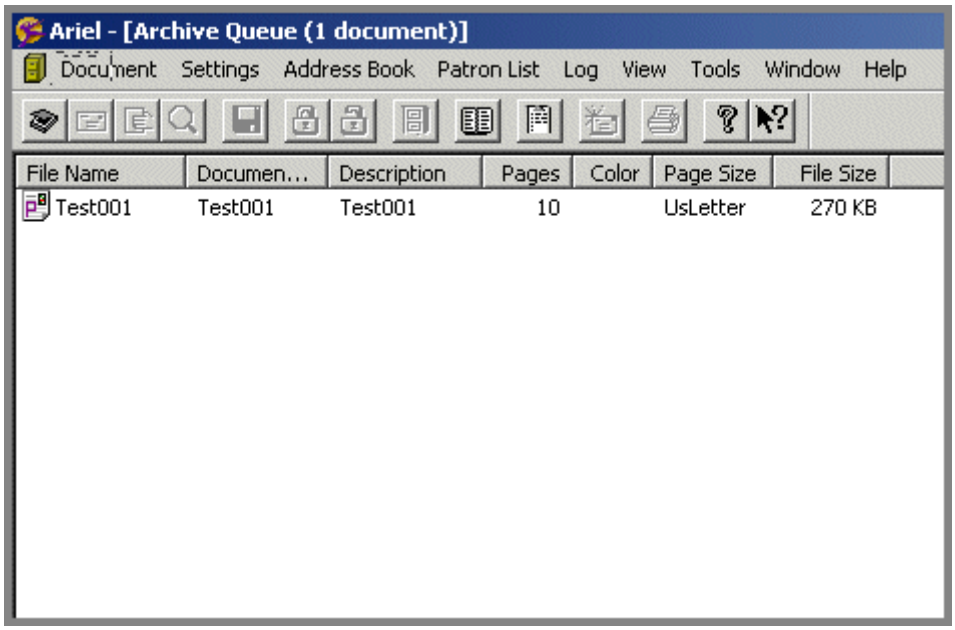
*3. You can select **Open Archive** from the **Document** menu to see the list of saved documents, and double-click on a document to view the document details.*

Saving Documents

To save the document in the Archive Queue window:

Step 1. Enter the relevant details in the Header Information and Archive Entry Identification sections.

Step 2. Click **OK** to save the document. The Save window is closed and the document is saved and displayed in the Archive Queue window.



When you save a document with a unique file name, the document is automatically saved in the Archive Queue window.

Deleting Documents

You can delete the documents from the Send, Delivery, Received, and Archive Queue windows. You can delete only documents whose status is not 'Active' in the respective Queue windows.

The status of the document is 'Active' when it is being:

- Sent to a destination in the Send Queue window.
- Printed in the Received Queue window.
- Sent to a mail server in the Delivery Queue window. When the document is sent though mail server, the status of the document will be 'Sending' and when it is posted to a FTP server, the status will be 'Posted.'

You can delete the document in a specific Queue window when the number of documents exceed the limit specified for the Send and Received Queue windows. The number of documents that each Queue window can hold is specified in the Limit Documents to field in the Send and Receive Settings. For more information, see "Setting Up Send and Receive Options." A document can be deleted based on the time interval specified for deleting the document in the mail settings of the Preferences window. For more information, see "Setting Up Mail Options."

To delete a document, you can select the required document and select **Delete** from the **Document** menu. The document can also be deleted by selecting **Delete** from the shortcut menu. The shortcut menu can be accessed by right clicking a document. In addition, you can select the **Send and Delete** option in the Disposition field of the Send window to directly delete the document after it is sent.

1. The icon before the Document ID field in the respective Queue windows will be highlighted in yellow indicating that the document is active in the specific Queue.

2. Only one document can be active in a specific Queue window.

3. The document will be deleted only after it is received by the intended Ariel workstation or patron.

Step by Step

You can delete documents from the Archive, Send, Received, or Delivery Queue windows.

Deleting Documents from the Queue Windows

To delete a document:

Step 1. Select a specific document that you want to delete from the respective Queue window.

Step 2. Select **Document → Delete**. A confirmation message for deletion is displayed.

Step 3. Click **Yes** to delete the document or click **No** to cancel the deletion.

Importing and Saving Documents

In Ariel, you can import images of documents in .tif. .gif, .jpeg, .bmp, and .pdf format from an external location and save the document in the Archive Queue window. You can use the Import dialog box to import scanned images of a document. This dialog box will be displayed when you select **Import** from the **Document** menu. You can also select a document and right-click and select **Import** from the shortcut menu. You can then select the **Archive** submenu to import and save the image. The image that is imported is automatically saved in the Archive Queue window.

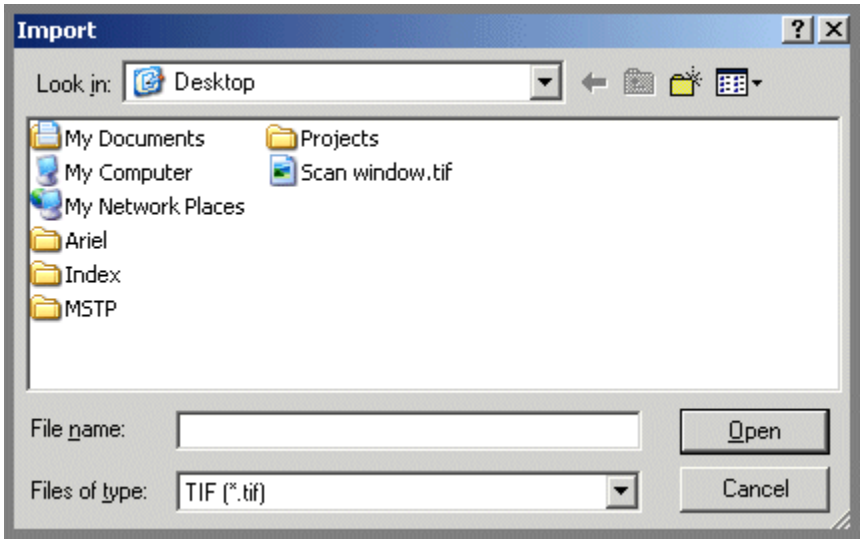
Step by Step

You can import and save documents using the Import dialog box.

Importing and Saving Documents

To import and save a document:

Step 1. Select **Document → Import → Archive**. The Import dialog box is displayed.



Step 2. Select the location from the Look in drop-down list. The folders in the location are displayed.

Step 3. Select the required .tif, .gif, .jpeg, .bmp, or .pdf file from the folder. The file name is displayed in the File name field.

Step 4. Click **Open**. The file name and the document ID is automatically generated for the selected .tif image and the details of the imported image are automatically displayed in the Archive Queue window.

Importing and Sending Documents to Ariel Workstations

You can import images of the scanned documents in .tif, .gif, .jpeg, .bmp, and .pdf format from an external location and send them to Ariel workstations. The details of the documents sent will be displayed in the Send Queue window. You can import the files using the Import dialog box. This dialog box will be displayed when you select **Import** from the **Document** menu. You can also select a document and right-click and select **Import** from the shortcut menu. Documents can be imported and sent to Ariel workstations using the **Send** submenu. The Send window will be displayed when you select this submenu. You can specify the document ID and Internet Protocol address of the Ariel workstation and send the document to an Ariel workstation.

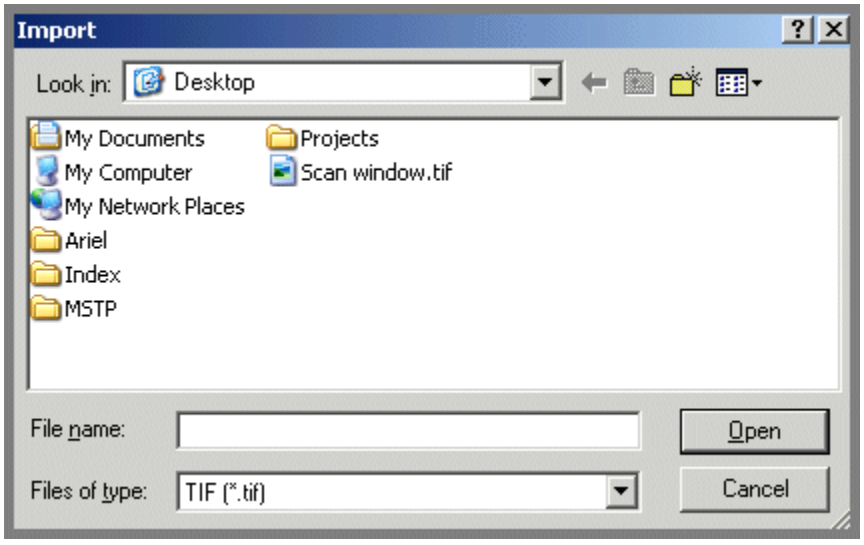
Step by Step

You can import and send images of documents to Ariel workstations using the Import dialog box.

Importing and Sending Documents

To import and send a document:

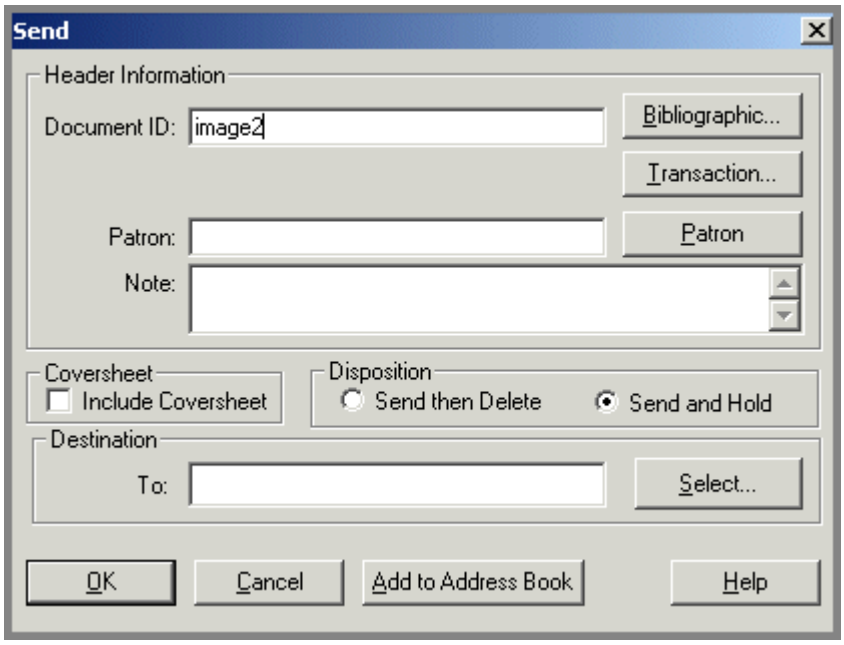
Step 1. Select **Document → Import → Send**. The Import dialog box is displayed.



Step 2. Select the location from the Look in drop-down list.

Step 3. Select the required .tif .gif, .jpeg, .bmp, or .pdf file. The file name is displayed in the File name field.

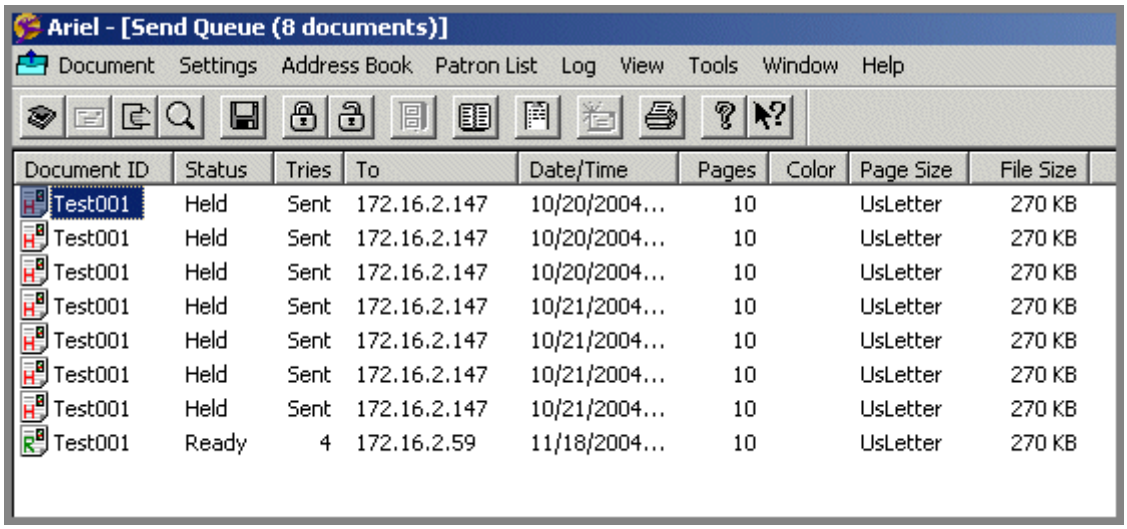
Step 4. Click **Open**. The Send window is displayed. The name of the file to be imported is displayed in the Document ID field.



Step 5. Modify the document ID if required.

Step 6. Enter the Internet Protocol address of the Ariel workstation.

Step 7. Click **OK**. The document is sent to the specific Ariel workstation and the details of the document are displayed in the Send Queue window.


Ariel - [Send Queue (8 documents)]
Document Settings Address Book Patron List Log View Tools Window Help
Document ID | Status | Tries | To | Date/Time | Pages | Color | Page Size | File Size
Test001 Held Sent 172.16.2.147 10/20/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/20/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/20/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/21/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/21/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/21/2004... 10 UsLetter 270 KB
Test001 Held Sent 172.16.2.147 10/21/2004... 10 UsLetter 270 KB
Test001 Ready 4 172.16.2.59 11/18/2004... 10 UsLetter 270 KB

Importing and Sending Documents to Patrons

You can import images of documents in .tif, .gif, .jpeg, .bmp, and .pdf format from an external location and send documents to patrons. The details of the documents sent will be displayed in the Delivery Queue window. You can import images of the documents using the Import dialog box. This dialog box will be displayed when you select **Import** from the **Document** menu. You can also select a document and right-click and select **Import** from the shortcut menu. Documents can be imported and sent to patrons using the **Send To Patron** submenu. The Send to Patron window will be displayed when you select this submenu. You can specify the patron category and the document ID and send the document to a patron. The details of the document will be displayed in the Delivery Queue window.

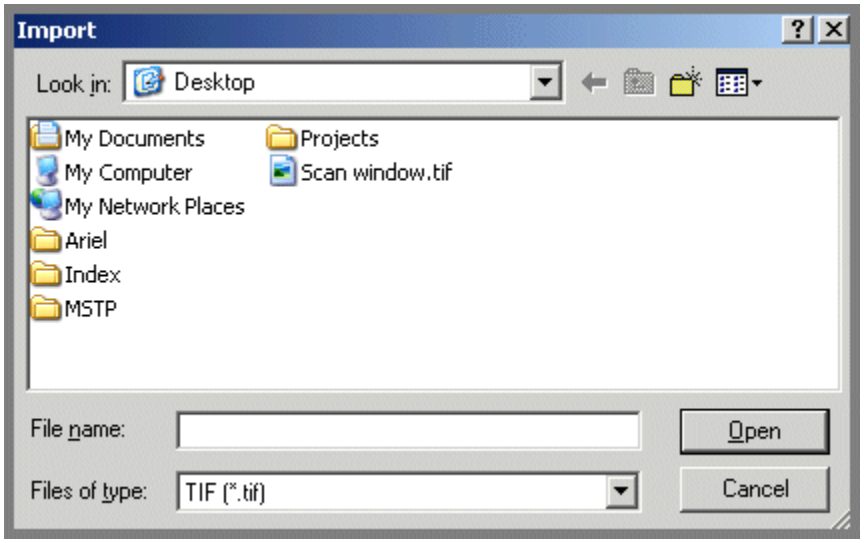
Step by Step

You can import images of documents and send them to patrons using the Import dialog box.

Importing and Sending Documents to Patrons

To import and send a document to a patron:

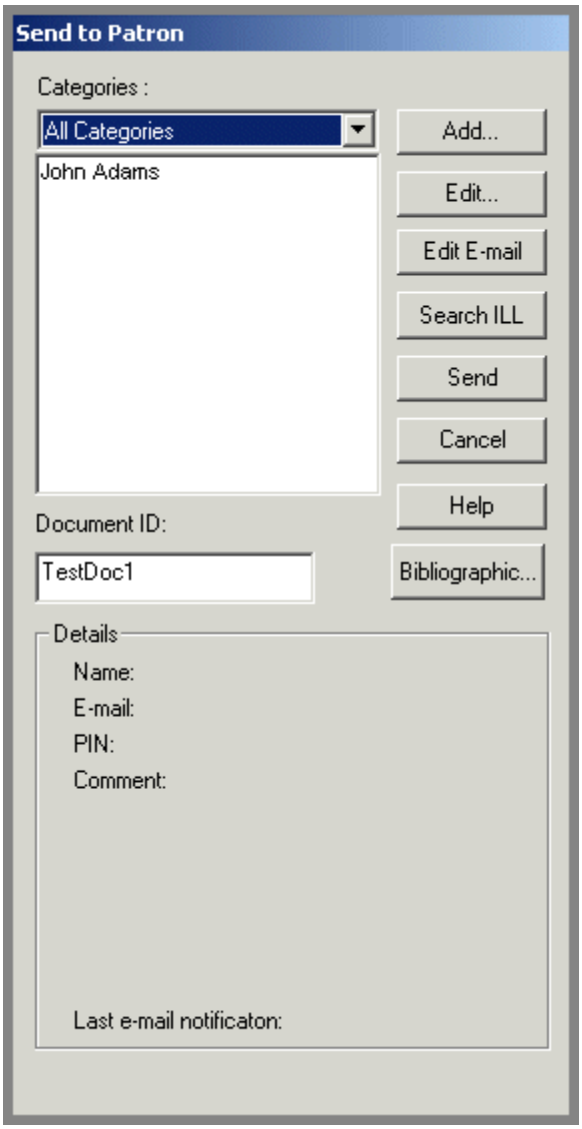
Step 1. Select **Document → Import → Send To Patron**. The Import dialog box is displayed.



Step 2. Select the location from the Look in drop-down list.

Step 3. Select the required .tif, .gif, .jpeg, .bmp, or .pdf file. The file name is displayed in the File name field.

Step 4. Click **Open**. The Send to Patron window is displayed. The file name is displayed in the Document ID field.

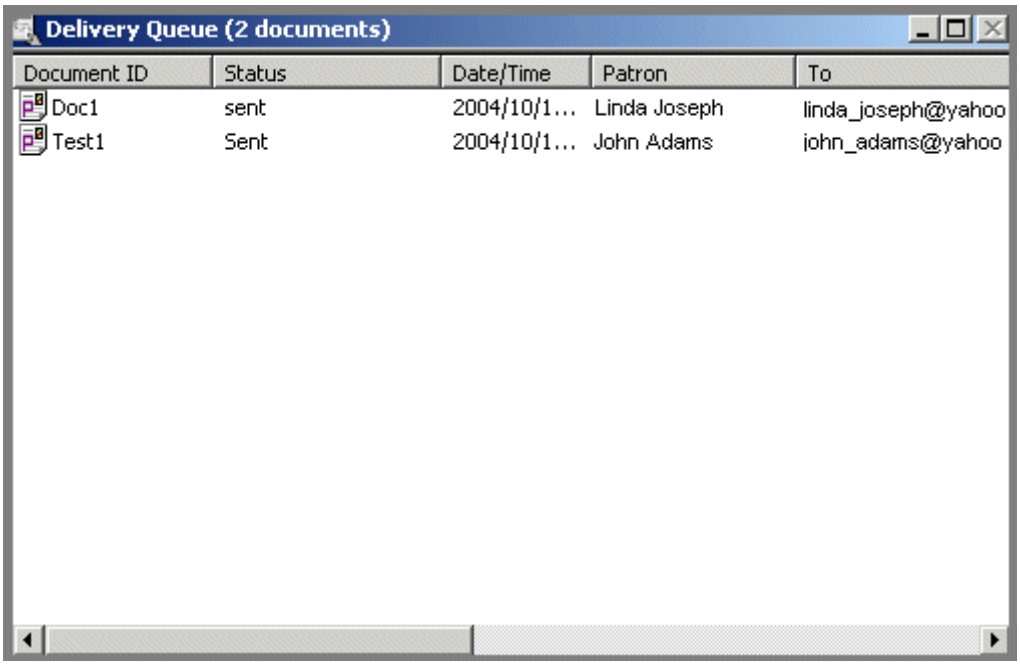


Step 5. Select the patron category from the drop-down list.

Step 6. Select the patron name from the list.

Step 7. Modify the document ID if required.

Step 8. Click **OK**. The document is sent to the patron and the details of the document are displayed in the Delivery Queue window.



Setting Up Log Options

When documents are sent or received by an Ariel workstation the details of the transfer are maintained in a log file. The log entries contain details of successful transfer or receipt of documents. The details in the log file are useful to track the transfer status of the documents, identify errors, and troubleshoot them.

You can set up the log options to view the log details of documents sent or received. You can set the log options using the Ariel Log Options window. This window can be accessed by selecting Options from the Log menu. You can specify the number of days after which the log entries can be deleted from the Ariel Log Viewer window. The document log details are displayed based on the log options set up in the Ariel Log Options window.

Field Descriptions

The fields in the Ariel Log Options window are described in the following table.

Field Name	Description
Delete log entries older than	The number of days after which the document log details will be deleted from the Ariel Log Viewer window. Default number of days is 30. This is a mandatory field. You can enter an integer value between 7 and 90.
Include diagnostic logging	Select this check box if you want the Ariel Log Viewer to show additional information about the log entries automatically. This can be useful while troubleshooting. For example, the details of a report can be displayed in the Ariel Log Viewer window every time the application contacts your FTP to check for new mails.

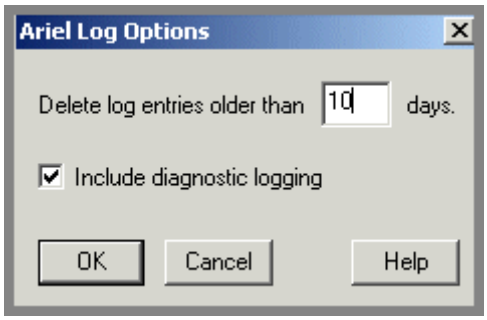
Step by Step

You can set up the log options using the Ariel Log Options window.

Accessing the Log Options Window

To access the Log Options window:

Step 1. Select **Log → Options**. The Ariel Log Options window is displayed.



Step 2. Set up the log options as required.

Setting Up Log Options

To set the log options:

Step 1. Enter the number of days in the Delete log entries older than field.

Step 2. Select the Include diagnostic logging check box if required.

Step 3. Click **OK** to save the log options and close the window.

Step 4. You can also click **Cancel** to close the Ariel Log Options window without saving the log options.

Viewing Log Entries

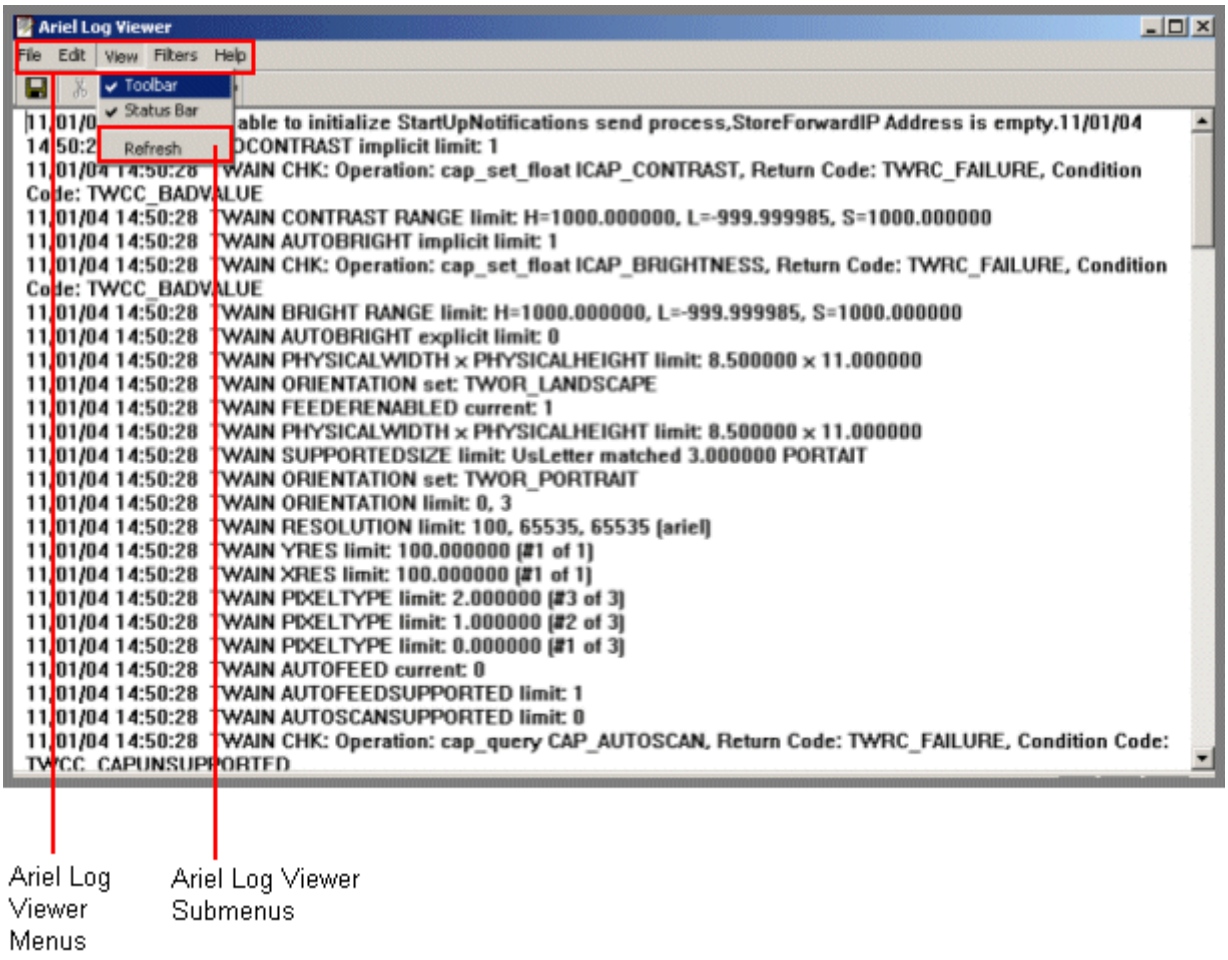
After you set up the log options, you can view the log details of documents sent or received. In addition, you can view the details of error messages when documents are not sent to Ariel workstations or patrons or received from other Ariel workstations. You can use the Ariel Log Viewer window to view the log details. This window can be accessed when you select **Show Log** from the **Log** menu. You can also access this window by clicking in the toolbar.

In the Ariel Log Viewer window, by default, the filters are set to show you every send and receive entry in the reverse-chronological order. The oldest entries are automatically deleted based on the number of days specified for deletion of entries in the Ariel Log Options window. You can use the horizontal and vertical scroll bar to view the log entries. If the window size is adjusted, the log details are automatically displayed based on the width of the window and the text will be displayed in the next line.

The Ariel Log Viewer window consists of various menu and submenu items using which you can perform tasks related to log entries. The available options are:

- File - Used to save, view, and print the log entries.
- Edit - Used to edit, undo, cut, copy, paste, search for specific details, and replace texts.
- View - Used to view the tool bar, status bar, refresh, and update new entries in the Ariel Log Viewer window.
- Filters - Used to set various filter options and save the filter settings.

- Help - Used to view the help topic.


Ariel Log Viewer
File Edit View Filters Help
Toolbar
Status Bar
Refresh
able to initialize StartUpNotifications send process,StoreForwardIP Address is empty.11/01/04
OCONTRAST implicit limit: 1
TWAIN CHK: Operation: cap_set_float ICAP_CONTRAST, Return Code: TWRC_FAILURE, Condition
Code: TWCC_BADVALUE
11/01/04 14:50:28 TWAIN CONTRAST RANGE limit: H=1000.000000, L=-999.999985, S=1000.000000
11/01/04 14:50:28 TWAIN AUTOBRIGHT implicit limit: 1
11/01/04 14:50:28 TWAIN CHK: Operation: cap_set_float ICAP_BRIGHTNESS, Return Code: TWRC_FAILURE, Condition
Code: TWCC_BADVALUE
11/01/04 14:50:28 TWAIN BRIGHT RANGE limit: H=1000.000000, L=-999.999985, S=1000.000000
11/01/04 14:50:28 TWAIN AUTOBRIGHT explicit limit: 0
11/01/04 14:50:28 TWAIN PHYSICALWIDTH x PHYSICALHEIGHT limit: 8.500000 x 11.000000
11/01/04 14:50:28 TWAIN ORIENTATION set: TWOR_LANDSCAPE
11/01/04 14:50:28 TWAIN FEEDERENABLED current: 1
11/01/04 14:50:28 TWAIN PHYSICALWIDTH x PHYSICALHEIGHT limit: 8.500000 x 11.000000
11/01/04 14:50:28 TWAIN SUPPORTEDSIZE limit: UsLetter matched 3.000000 PORTAIT
11/01/04 14:50:28 TWAIN ORIENTATION set: TWOR_PORTRAIT
11/01/04 14:50:28 TWAIN ORIENTATION limit: 0, 3
11/01/04 14:50:28 TWAIN RESOLUTION limit: 100, 65535, 65535 (ariel)
11/01/04 14:50:28 TWAIN YRES limit: 100.000000 (#1 of 1)
11/01/04 14:50:28 TWAIN XRES limit: 100.000000 (#1 of 1)
11/01/04 14:50:28 TWAIN PIXELTYPE limit: 2.000000 (#3 of 3)
11/01/04 14:50:28 TWAIN PIXELTYPE limit: 1.000000 (#2 of 3)
11/01/04 14:50:28 TWAIN PIXELTYPE limit: 0.000000 (#1 of 3)
11/01/04 14:50:28 TWAIN AUTOFEED current: 0
11/01/04 14:50:28 TWAIN AUTOFEEDSUPPORTED limit: 1
11/01/04 14:50:28 TWAIN AUTOSCANSUPPORTED limit: 0
11/01/04 14:50:28 TWAIN CHK: Operation: cap_query CAP_AUTOSCAN, Return Code: TWRC_FAILURE, Condition Code:
TWCC_CAPUNSUPPORTED
Ariel Log Viewer Menus
Ariel Log Viewer Submenus

Submenus in the Ariel Log Viewer Window

The sub menus in the File, Edit, View, Filters, and Help menus displayed in the Ariel Log Viewer window are described in the following table.

Sub Menu	Used to
File Menu	
Save As	Save the active log entries in a different file name or location. When you click this button, the Save As dialog box will be displayed. You can specify the location, file name, and type to save the log entries in a specific location.
Print	Print log entries that are displayed in the Ariel Log Viewer window. When you click this button, the Print dialog box is displayed. You can select the required options and print the log entries.
Print Preview	View how the log details will be displayed in a page before it is printed. You can zoom in or zoom out, navigate to the next and previous page, view the log details in a page or in two pages, print, or close the preview window using the respective command buttons that are displayed in this window.
Print Setup	Set the printing options such as setting up margins, paper size, orientation, and other lay out options before printing the log entries.
Exit	Close the Ariel Log Viewer window.
Edit Menu	
Undo	Undo the last action performed in the Ariel Log Viewer window for a specific log entry. For example, you can undo the last entry you have deleted in this window.

Sub Menu	Used to
Cut	Remove a section of the selected text from a specific log entry.
Copy	Copy a section of the selected text in a specific log entry.
Paste	Paste the copied contents of the selected text into a different location in the Ariel Log Viewer window.
Paste Special	Insert or embed the contents of a selected text copied in a different location in the format you specify.
Select All	Select all the text in the Ariel Log Viewer window.
Find	Search for a specific text in the Ariel Log Viewer window. The Find window will be displayed. You can specify the text you want to search in the **Find what** text box and select the required check box and click **Find Next**. The selected text will be highlighted in the Ariel Log Viewer window.
Find Next	Search for the next occurrence of a previously searched text specified in the **Find what** text box.
Replace	Replace a specific text with the text in the Ariel Log Viewer window. When you select this sub menu, the Replace window will be displayed. You can specify the text you need to search in the **Find what** text box and replace it with the text you have entered in the **Replace with** text box. You can use the Replace and Replace All buttons to replace a specific text or all the occurrences of the text.

Sub Menu	Used to
View Menu	
Tool Bar	Show or hide the toolbar, which contains task buttons for performing a specific task in the Ariel Log Viewer window. When you select this submenu, a tick mark appears before this submenu and the tool bar is displayed below the main menu. Clicking the submenu again will hide the toolbar. Tip: You can also press enter to show or hide the tool bar.
Status Bar	Show or hide the status bar which will be displayed below the Ariel windows when this option is clicked. When you click on this submenu, a tick mark appears and the status bar is displayed below the main window. Clicking the submenu again will hide the status bar. Tip: You can also press enter to show or hide the status bar.
Refresh	Update the changes made to the log entries or show new log entries in the Ariel Log Viewer window.
Filters	
Set	Set filters that limit entries shown in the Ariel Log Viewer window. When you select this submenu, the Filters window will be displayed. You can specify the date range, events, or the display order. Based on these settings, the log entries will be displayed in the Ariel Log Viewer window.

Sub Menu	Used to
Save Filters on Exit	Save all the current filter settings set in the Filters window when this window is closed. When you select this submenu, The Save Filters on Exit option is set to On and a tick mark appears before this submenu. Clicking on this submenu again turns the Save Filters on Exit option Off. Note: When re opening the Log Viewer, you must recheck Save Filters on Exit if you wish to retain any change in the Filters dialog box.
Help Menu	
Contents	Display the various topics in the Help System.
Using Help	Explain how to use Windows help. The How to Use Help window will be displayed. View the help topics as required.
About Ariel Log Viewer	Display the current copyright and version details of the Ariel Log Viewer.

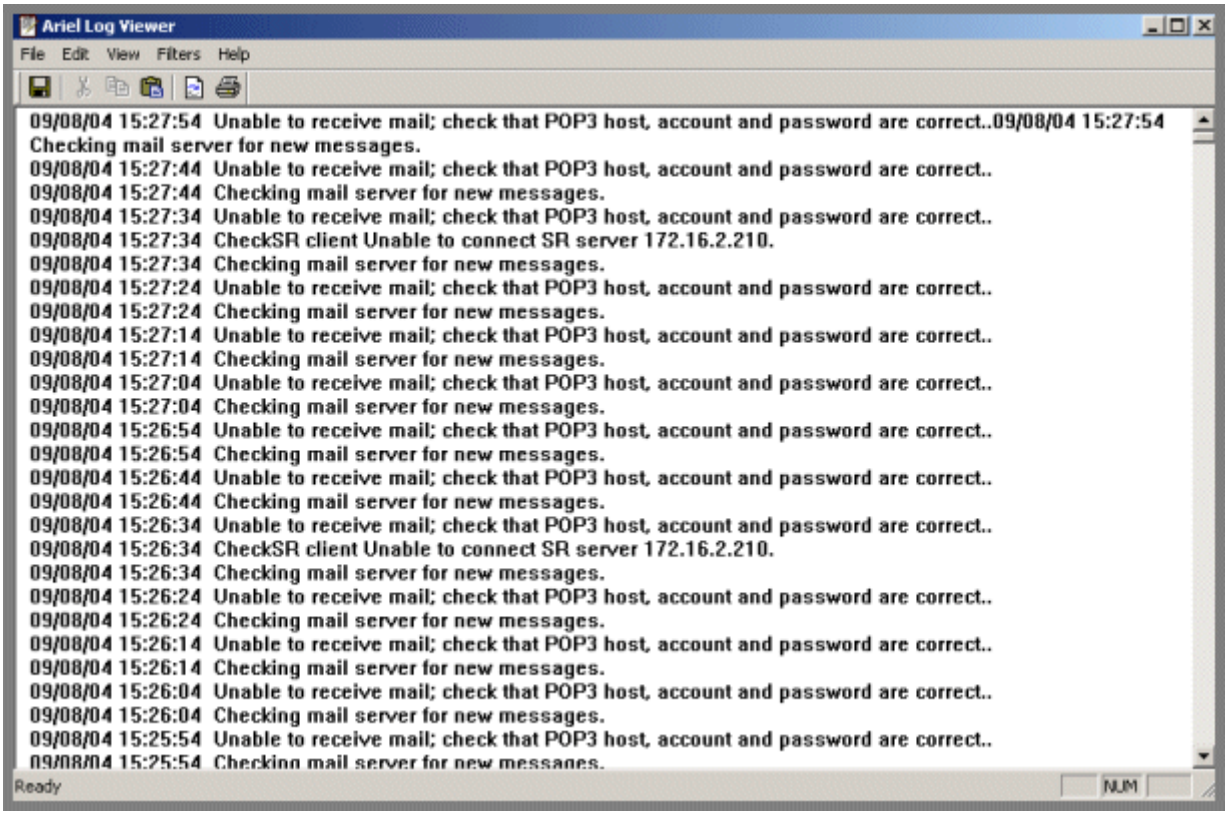
Step by Step

You can view the log details of documents sent or received using the Ariel Log Viewer window.

Accessing the Ariel Log Viewer Window

To access the Ariel Log Viewer window:

Step 1. Select **Log → Show Log**. The Ariel Log Viewer window is displayed.



Step 2. View the log details as required.

Setting Up Print Options

You can set up the print options to print documents that you receive in the Received Queue window. You can set the print options by selecting **Print Setup** in the **Document** menu. The Print Setup window will be displayed. This window can also be accessed by selecting **Print Setup** from the shortcut menu, which will be displayed by right-clicking a specific document.

The window elements in the Print Setup window are described in the following table.

Element	Used to
	Set up additional printing options for the printer.
	Connect to a specific network printer.

Field Descriptions

The fields in the Print Setup window are described in the following table.

Field Name	Description
Printer	
Name	The name of the printer. You can select the printer name from the drop-down list. Only the configured printers will be displayed in the drop-down list.
Status	The status of the printer which will be automatically displayed when you select a printer name. It indicates whether the printer is enabled or disabled.
Type	The model of the printer. For example, HP Laser Jet 4300 PCL6.
Where	Indicates the Internet Protocol address of the printer.
Comment	Any additional information about the printer which is automatically displayed.

Field Name	Description
Paper	
Size	The paper size which the printer supports. You can select a required size from the drop-down list. The paper size you select must match the size of the tray installed on your printer. If you select 'Any Size' as the paper size option and click **Print** or automatically print the received documents, Ariel scales documents vertically and horizontally to match the paper size you have selected based on the available tray sizes.
Source	The paper sources available in your printer for printing the documents. For example, Auto Select, Manual Feed, Tray 1, Tray 2, or Tray 3.
Orientation	
Portrait	Select this option to print the document in the vertical print orientation.
Landscape	Select this option to print the document in the horizontal print orientation. The document is printed sideways - that is the width of the text on the page will be greater than the height. Note: When you receive a page that is scanned as Landscape, you must select the Landscape option before printing.

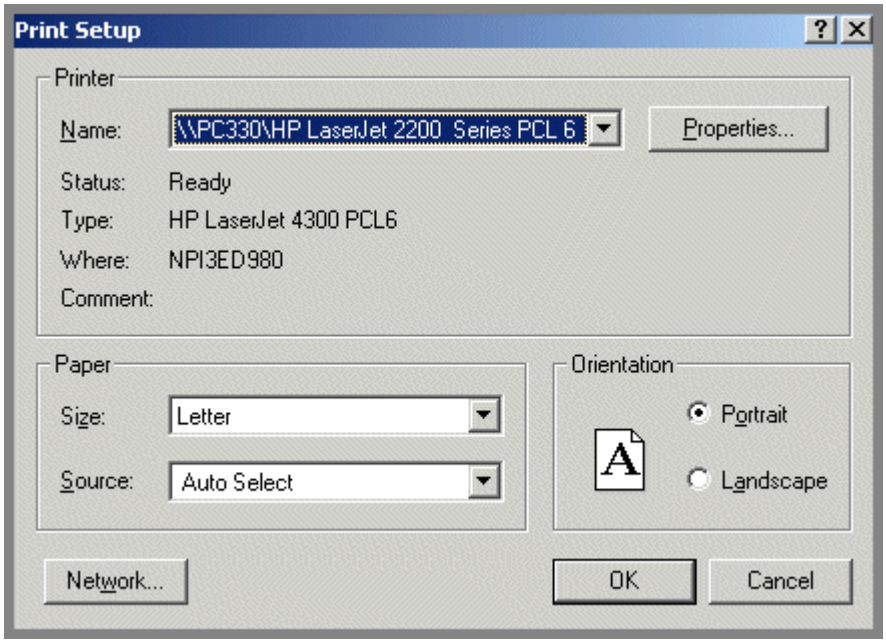
Step by Step

You can set up the print options using the Print Setup window.

Accessing the Print Setup Window

To access the Print Setup window:

Step 1. Select **Document → Print Setup**. The Print Setup window is displayed.



Step 2. Set up the print options as required.

Setting Up Print Options

To set up the print options:

Step 1. Select the printer name, paper size, source, and orientation in the Print Setup window.

Step 2. Click **OK** to save the print settings and close the Print Setup window.

Step 3. You can also click **Cancel** to cancel the print settings and close the Print Setup window.

Printing Documents

You can print documents by selecting them from the Archive, Send, Received, and Delivery Queue windows. Before you print the document, you must set up the print options. To print a document, you can select **Print** from the **Document** Menu. The Print dialog box will be displayed. This dialog box will also be displayed when you select **Print** from the shortcut menu. The shortcut menu will be displayed when you right-click a specific document. You can also click in the toolbar to print documents.

You can also automatically print the documents you have received in the Received Queue window by selecting the **Auto Print** check box in the **Auto-Print** tab of the Preferences window. When this check box is selected, the application automatically prints the document received in the Received Queue window.

*If the **Auto Printing On** check box is selected for grayscale or color documents, ensure that required system settings are already set up in your Ariel workstation and the printer to enable printing of colored pages.*

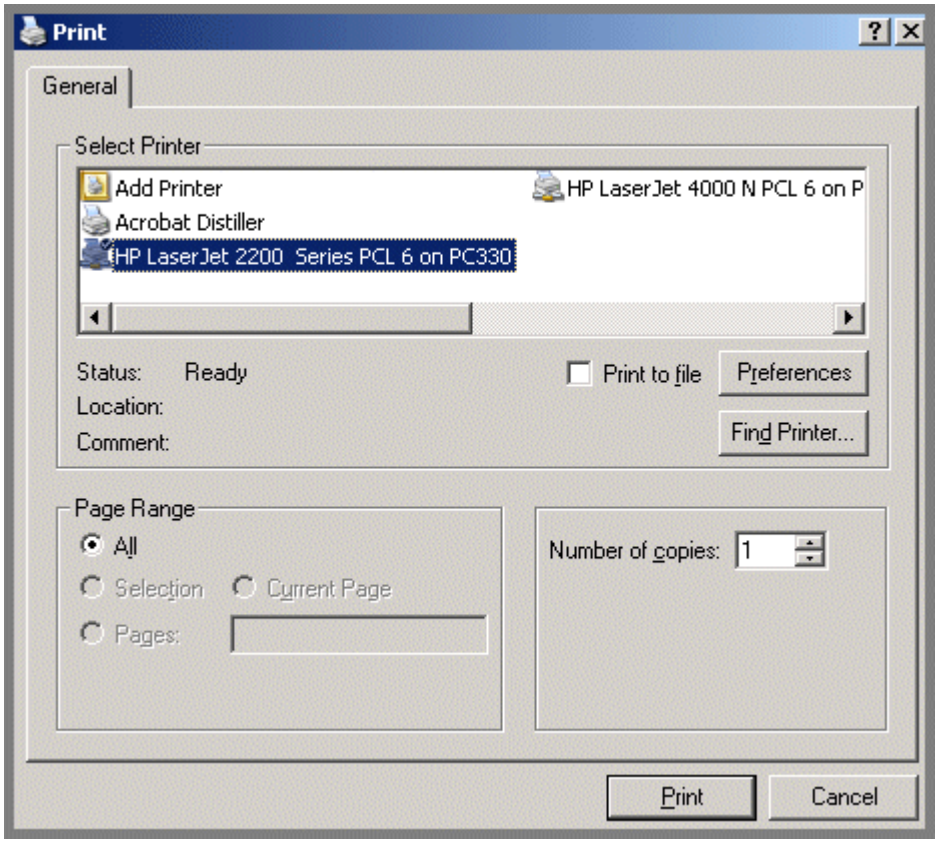
Step by Step

You can print documents using the Print dialog box.

Accessing the Print Dialog Box

To access the Print dialog box:

Step 1. Select **Document → Print**. The Print dialog box is displayed with the default printer selected.



Step 2. Print the documents as required.

Printing Documents

To print a document:

Step 1. Select the specific document you want to print from the respective Queue window.

Step 2. Select **Document → Print**. The Print dialog box is displayed with the default printer selected.

Step 3. Select the page range and number of copies to be printed.

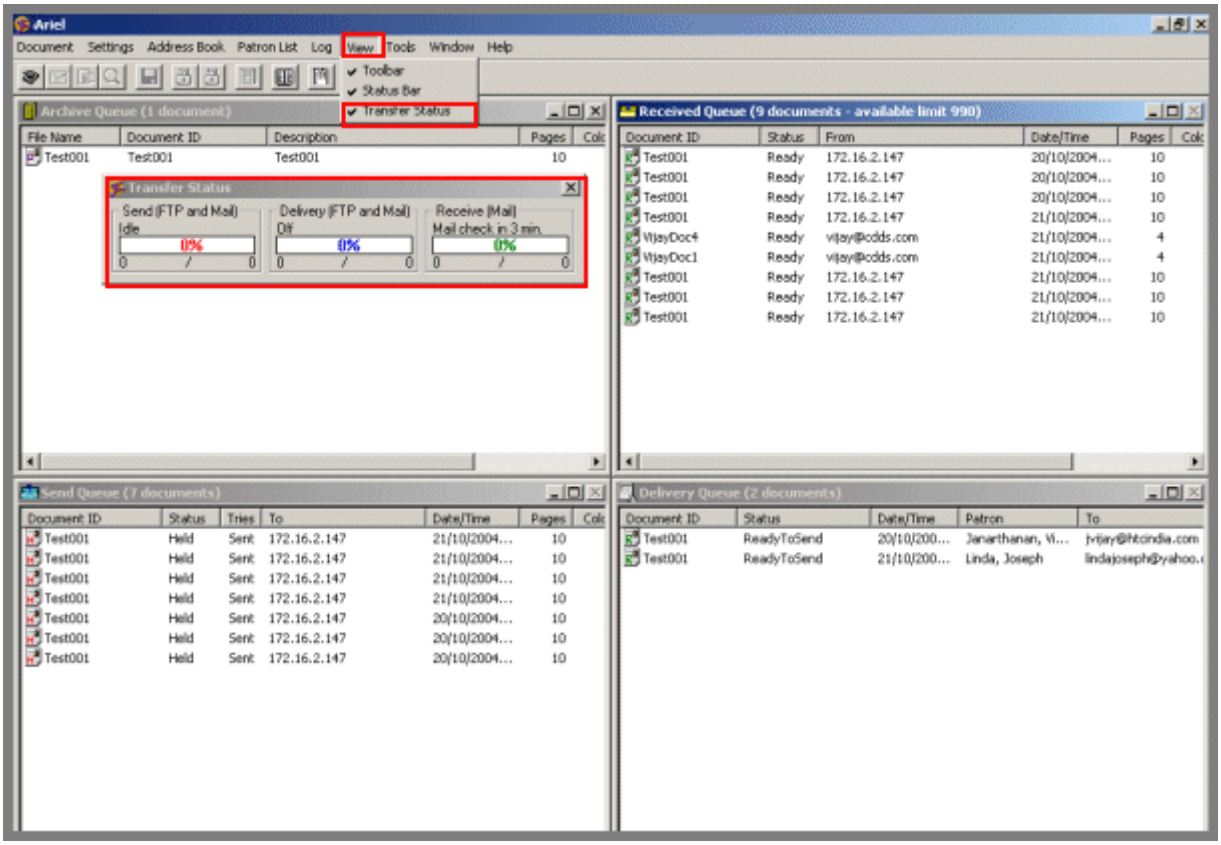
Step 4. Click **Print** to print the document.

Step 5. You can also click **Cancel** to cancel printing.

Viewing Document Transfer Status

You can view the progress of the documents sent to Ariel workstations or patrons or documents received from other Ariel workstations via email or FTP. You can monitor the progress of the document being sent or received based on the percentage specified in the progress indicator, which is displayed in the respective fields. The progress indicator for sending documents to Ariel workstations and patrons and documents received are indicated with a different font color for easy identification.

When the size of the document you have sent or received is large, you can monitor the progress of the document sent or received using the Transfer Status window. This window can be accessed by selecting **Transfer Status** from the **View** menu. When this submenu is selected, a tick mark appears before the submenu. You can select this submenu again to close the Transfer Status window. The tick mark disappears and the Transfer Status window will be closed.



Field Descriptions

The fields in the Transfer Status window are described in the following table.

Field Name	Field Description
Send (FTP and Mail)	Indicates the current status of the document sent to an Ariel workstation by FTP and email. When the document is being sent to an Ariel workstation, the different stages of the transaction process are displayed in this field. In addition, the percentage transferred will also be displayed in this field.
Delivery (FTP and Mail)	Indicates the current status of the document sent to a patron by FTP and email. When the document is being sent to the patron, the different stages of the transaction process are displayed in this field. In addition, the percentage transferred will also be displayed in this field.
Receive (Mail)	Indicates the current status of the document received by FTP or email in the Received Queue window. When the document is being received from another Ariel workstation, the different stages of the transaction process are displayed in this field. In addition, the percentage transferred will also be displayed in this field. Note: The time duration for receiving the mails can also be specified in this field.

When documents are sent to other Ariel workstations, the different stages of the transaction process are displayed in the Send (FTP and Mail) field. The different transaction statuses are described in the following table.

Status	Description
Off	Indicates that sending of documents is currently suspended.
Idle	Indicates that Sending option is On but documents were not sent for specific time duration.
Connecting	Indicates that the application is currently being connected to the designated server or system.
Connected	Indicates that the application is connected to the designated server or system.
Sending	Indicates that the document is currently being sent to the respective destination.
Send Disabled	Indicates that sending of documents is suspended at the application level. When the **Sending On** check box in the **Send/Receive** tab of the Preferences window is not selected, the sending process is said to be suspended at the application level. The documents will not be sent to the Ariel workstations.

When documents are sent to patrons, the different stages of the transaction process are displayed in the Delivery (FTP and Mail) field. The different transaction statuses are described in the following table.

Status	Description
Off	Indicates that delivery of documents is currently suspended.
Idle	Indicates that the Delivery option is turned On but documents were not sent to the patron for a specific time duration.

Status	Description
Connecting	Indicates that the application is currently being connected to the designated server or system.
Connected	Indicates that the application is connected to the designated server or system.
Delivering/ Posting	Indicates that the document sent to the patron is being posted to the designated server.
Delivering Disabled	Indicates that the delivery of documents is suspended at the application level. When the **Delivering On** check box is not selected in the **Patron Delivery** tab of the Preferences window, the delivery of documents is said to be suspended at the application level. The documents will not be sent or posted to the designated server.

When documents are received from other Ariel workstations, the different stages of the transaction process are displayed in the Receive (Mail) field. The different transaction statuses are described in the following table.

Status	Description
Mail Check in min.	Indicates that the application will check for incoming mails after specific time duration in minutes. The time duration for checking incoming mails is specified in the **Mail** tab of the Preferences window.
Checking Mails	Indicates that the application is currently checking for new mails.
Retrieving Messages	Indicates that application has checked for new mails and is in the process of retrieving all the mails. The total number of mails received and the number of mails retrieved currently will be displayed.

Status	Description
No New Messages	Indicates there are no new mails since the last mail check.
Mail Receive Complete	Indicates that all the mails have been received in the Received Queue window.
Mail Check Failure	Indicates that there was an error while checking for mails.

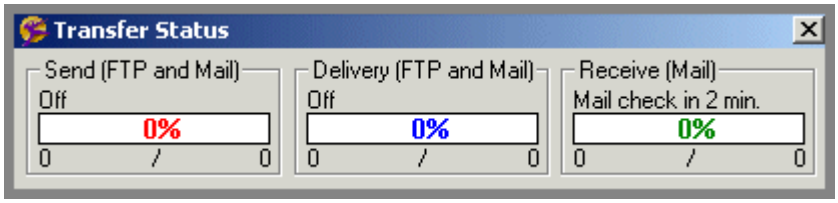
Step by Step

You can view the current status of the document sent to Ariel workstation, patron, or received in the respective Queue windows using the Transfer Status window.

Accessing the Transfer Status Window

To access the Transfer Status window:

Step 1. Select **View → Transfer Status**. The Transfer Status window is displayed.



Step 2. View the progress and current status of the documents sent or received.

Viewing Status of Documents Sent to Ariel Workstations

To view the transfer status of documents sent to Ariel workstations:

Step 1. Navigate to the Transfer Status window from the main menu.

Step 2. Select the document you want to send from the respective window.

Step 3. Select **Document → Send**. The Send window is displayed.

Step 4. Enter the relevant details in the respective fields.

Step 5. Click **OK**. You can view the different status through which the document passes through in the Send (FTP and Mail) Field of the Transfer Status window when it is being sent to the specific Ariel workstation.

You can view the percentage of the document sent to an Ariel workstation only when Sending is 'On.'

Viewing Status of Documents Sent to Patrons

To view the transfer status of documents sent to patrons:

Step 1. Navigate to the Transfer Status window from the main menu.

Step 2. Select the document you want to send from the respective window.

Step 3. Select **Document → Send to Patron**. The Send to Patron window is displayed.

Step 4. Enter the relevant details in the respective fields.

Step 5. Click **Send**. You can view the different status through which the document passes through in the Delivery (FTP and Mail) Field of the Transfer Status window when it is being sent to the specific patron.

You can view the percentage of the document sent to a patron only when Delivering is 'On.'

Viewing Status of Documents Received

To view the transfer status of documents received from other Ariel workstations:

Step 1. Select the document you have received in the Received Queue window.

Step 2. Navigate to the Transfer Status window. You can view the different status through which the document passes through in the Receive (Mail) Field.

You can view the percentage of the document you have received only when Receiving is 'On.'

Creating and Maintaining Bibliographic Details

Bibliographic information refers to the details of a book such as author name, publisher name, date of publication, volume number, International Standard Book Number (ISBN), and International Standard Serial Number (ISSN).

You can create and maintain the bibliographic details of a document while sending the document to an Ariel workstation in the Send window or to a patron in the Send to Patron window. You can also add bibliographic details of a document when you save the document in the Save window. Maintaining bibliographic details of a document is useful when scanned pages of a book are transferred between libraries. For example, if an entire book is required from an Ariel workstation or a patron, the bibliographic information can be used for identifying and locating the book faster by verifying the author name or ISBN.

You can use the Bibliographic Info window to create and maintain the bibliographic details. The fields in this window form a part of the GEDI header. GEDI header stands for a Group of Electronic Document Interchange. It consists of fields which are stored at the beginning of a document. It can also contain bibliographic and transaction information.

Field Descriptions

The fields in the Bibliographic Info window are described in the following table.

Field Name	Field Description
Author	The name of the author of the document.
Title	The name of the document.
Place of Publication	The place where the document was published.
Publisher	The name of the publisher of the document.
Publication Date	The date on which the document was published. You can enter the date or select the date from the Calendar lookup. Note: If the publication date specified is not in the prescribed format, an appropriate error message will be displayed prompting you to enter the date in the valid date.
Edition	The edition number of the document.
Volume-Issue	The number of volumes or issues of the document published till the current year.
Component Pub Date	The date on which a collection of articles, research papers, or white papers are compiled as a book (component) and published. You can enter the date or select it from the Calendar lookup. Note: If the component publication date specified is not in the prescribed format, an appropriate error message will be displayed prompting you to enter the date in the valid format.
Call Number	A unique number assigned to a book or document based on the category to which it belongs.
ISBN	The International Standard Book Number assigned to the document.

Field Name	Field Description
ISSN	The International Standard Serial Number assigned to the document.
Page Numbers	The total number of pages in the document.
No. Pages	The total number of pages of the document scanned which is automatically displayed when this window is accessed.
Author of Article	The author name of the article. This is applicable only if the document scanned is an article.
Title of Article	The name of the article.

Step by Step

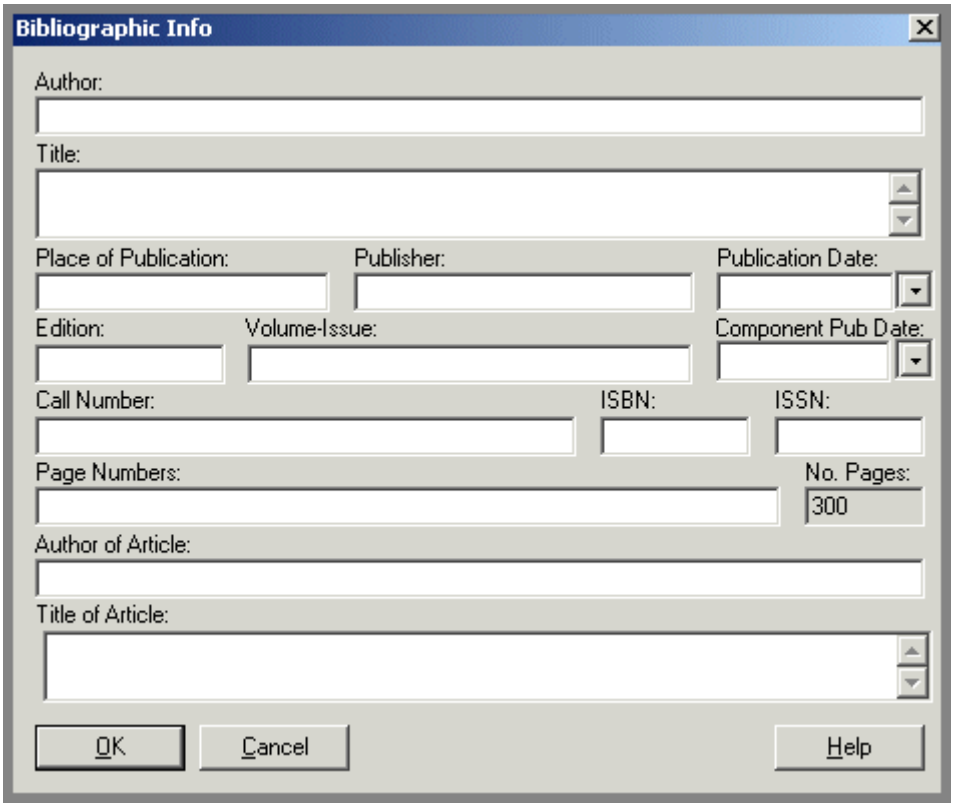
You can add or modify the bibliographic details of a document using the Bibliographic Info window.

Accessing the Bibliographic Info Window

To access the Bibliographic Info window:

Step 1. Navigate to the Send, Send to Patron, or Save window from the main menu.

Step 2. Click **Bibliographic**. The Bibliographic Info window is displayed.



Step 3. Add or modify the bibliographic details as required.

Adding Bibliographic Details

To add bibliographic details of a document:

Step 1. Enter the relevant details in the respective fields in the Bibliographic Info window.

Step 2. Click **OK** to save the bibliographic details and close the window.

Step 3. You can also click **Cancel** to close the window without saving the details.

Modifying Bibliographic Details

To modify the bibliographic information of a document:

Step 1. Select the specific document whose bibliographic details you want to modify from the required Queue window.

Step 2. Select **Document → Info Edit**. The respective Queue Entry window is displayed.

Step 3. Click **Bibliographic**. The Bibliographic Info window is displayed.

Step 4. Make the necessary changes as required.

Step 5. Click **OK** to save and update the changes and close the window.

Step 6. You can also click **Cancel** to cancel the update and close the Bibliographic Info window.

*You can also modify the bibliographic details of a document from the Received and Delivery Queue windows. You can select a specific document and right-click and select **Info Edit** from the **Document** menu or the shortcut menu. The respective Queue Entry window will be displayed. You can then click **Bibliographic** to modify the bibliographic details of the selected document.*

Managing Documents in Send Queue Window

The Send Queue window displays the list of documents that are waiting to be sent to various Ariel workstations. You can use the Send window to send documents to Ariel workstations or patrons or you can save the document in the Archive Queue window. The tasks such as changing document status, viewing, deleting, importing, printing documents, and viewing transfer status of documents are common to all Queue windows and are discussed in "Common Tasks in Document Management." In addition, you can cancel documents whose status is 'Active' in the Send Queue window. You can also modify the document details and cancel currently sent documents. The procedural and task related information for performing these tasks are discussed in the following sections:

- Understanding Send Queue Window
- Sending Documents to Ariel Workstations
- Sending Documents to Patrons
- Modifying Document Details in Send Queue Window
- Canceling Documents in Send Queue Window

Understanding Send Queue Window

Before you can perform various document management tasks, you need to understand how the documents are managed in the Send Queue window.

In Ariel, documents can be sent to Ariel workstations and patrons using the Send Queue window. The Send Queue window displays the list of documents that are in queue and are waiting to be sent to Ariel workstations. Documents that are sent to Ariel workstations are sent via FTP and SMTP. When the destination address is an Internet Protocol address, the document will be sent via FTP and if the address is in the form of an email ID, the documents will be sent via SMTP.

Document Status in Send Queue Window

The different statuses of a document in the Send Queue window are described in the following table.

Status	Description
Ready	Indicates that the document is ready to be sent to the Ariel workstation when Sending is 'On.' This is the default status. The symbol 'R' will be displayed in the icon before the Document ID field.
Held	Indicates that the document has been sent and the copy of the document is retained in the Send Queue window. It also indicates that the document is being held and waiting to be sent in the Send Queue window. The symbol 'H' will be displayed in the icon before the Document ID field. The status of the document will be 'Held' until you release the document. When the document is released, the document status will change to 'Ready' again.
Active	Indicates that the document is currently being sent. Active will be displayed in the status field. The icon before the Document ID field will be highlighted in yellow indicating that the document is active. If the Ariel workstation to which the document is sent is not currently accessible, the application will try to send the document 28 times within 24 hours.
Pending	Indicates that the document has been sent but has not been acknowledged by the receiver. The symbol 'P' will be displayed in the icon before the Document ID field.

Status	Description
Error	Indicates the document has been rejected by the FTP or email server. This may be due to the size of the document, invalid address, or when a negative acknowledgement is received from an Ariel workstation.

*1. You cannot choose **Send** from the **Document** menu to send documents that are already in the Send Queue window. You can save a document in the Archive Queue window and send it from there, or change or add a destination for a document which is already in the Send Queue window by choosing **Info/Edit** from the **Document** menu.*

2. You can send documents to the required destination only if Sending is On. To currently suspend the sending process, you can turn Sending Off. For more information see "Setting Up Send and Receive Options".

3. You cannot select a document whose status is 'Active'.

Field Descriptions

The fields in the Send Queue window are described in the following table.

Field Name	Field Description
Document ID	The title or phrase that identifies a document. The document ID is displayed with the status. The status is displayed in the icon before the field. The Document ID is entered in the Send, Save, or Send to Patron windows.
Status	The current status of the document, which is automatically displayed. For example, if the document is not received by the Ariel workstation, the status will be 'Pending.'

Field Name	Field Description
Tries	The number of times the application has tried to send the document. After 28 unsuccessful tries, a document will be kept on hold. If the receiving system has acknowledged receipt, 'Sent' will be displayed in this field.
To	The Internet Protocol address of the Ariel workstation to which the document is sent. This information is displayed based on the Internet Protocol address selected in the Send window.
Date/Time	The date and time when the document first entered the Send Queue window. This information is automatically displayed. The date will be displayed based on the format you select in the **General** tab of the Preferences window.
Pages	The total number of pages of the document.

Field Name	Field Description
Color	The color format used when the document was scanned. This is based on the color format set in the Scan window. The available options in the Scan window are B&W, Gray Scale, and Color. If 'C' is displayed, it indicates that some or all the pages of the document contain color and they were scanned using the color format. If 'G' is displayed, it indicates that some or all the pages in the document contain grayscale and they were scanned using the grayscale format. If there is no value displayed in this field, it indicates that all the pages in the document are black and white and the pages were scanned in black and white format.
Paper Size	The paper size of the largest page in the document. The paper size for scanning the pages of the document is set up in the **Scan** tab of the Preferences window. For example, if you have scanned the document using the Letter and A3 paper size, 'A3' will be displayed in this field, as this paper size is larger than 'Letter'.
File size	The file size of the document in kilobytes. This information is automatically displayed.

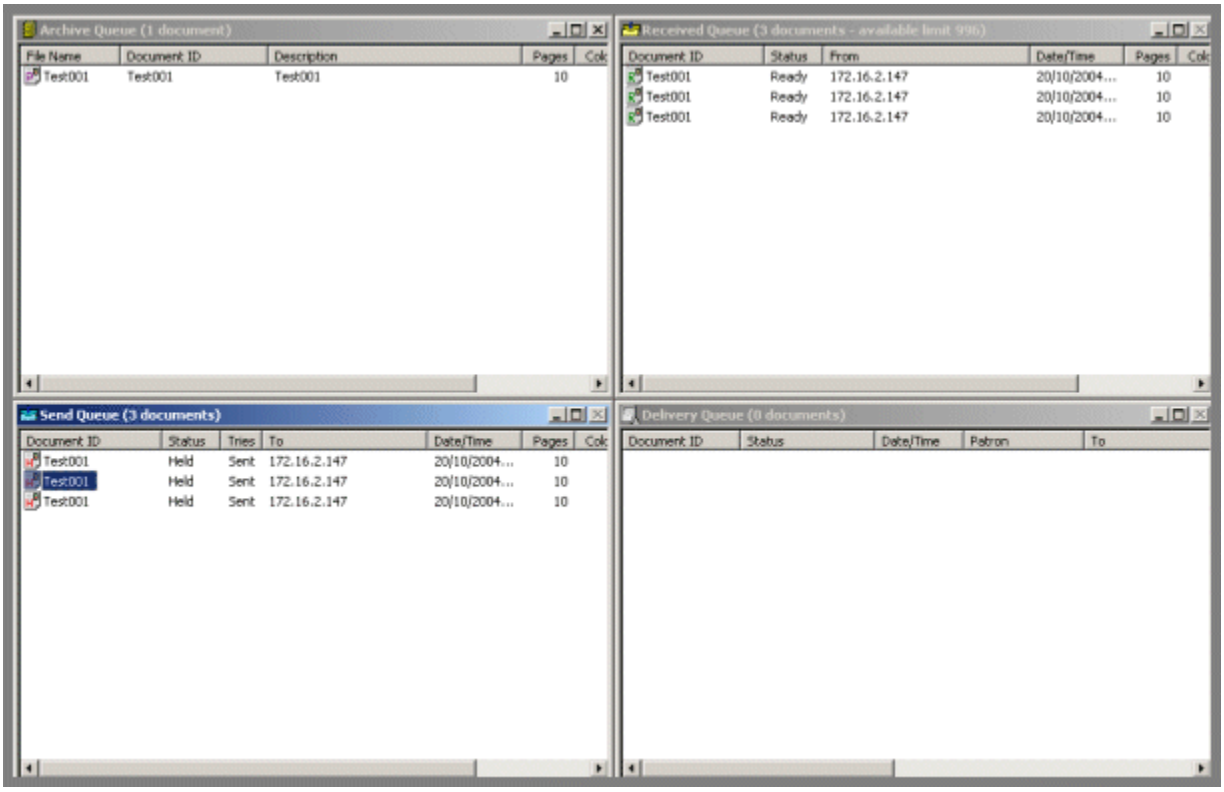
Step by Step

You can access and perform various tasks in the Send Queue window.

Accessing the Send Queue Window

To access the Send Queue window:

Step 1. Click the Send Queue window. The window is enabled.



Step 2. Select the required options and send the documents as required.

1. You can select a specific document and right-click to view the shortcut menu. Using the shortcut menu you can perform tasks such as scan, view, save, modify, print, delete, cancel, and import documents and send them to Ariel workstations or patrons or save them in the Archive Queue window. You can Send documents to patrons, cancel currently sent document, hold or release a document, check for new mails, set up print options, print documents, or exit the application by selecting the appropriate submenu from the shortcut menu.

*2. The **Cancel Current Send** submenu will be enabled only for active documents. The active documents will be highlighted in yellow in the Send Queue window.*

Sending Documents to Ariel Workstations

In Ariel, you can send the scanned documents from the Archive, Received, or Delivery Queue windows. You can send the document to an Ariel workstation or a patron. The Documents that are sent to Ariel workstations' Internet Protocol addresses are sent through FTP or SMTP. The details of the document are displayed in the Send Queue window.

To send documents to Ariel workstations, details of email, scan settings, scan options, scan dispositions, send and receive settings, and store forward and store retrieve settings have to be initially set up in the Preferences window. For more information about setting up these details, see "Setting Up Ariel".

You can use the Send window to send documents to Ariel workstations. This window can be accessed by selecting **Send** from the **Document** menu. You can send and delete the document or send and retain a copy of the document in the Send Queue window. When you send documents to Ariel workstations, you can attach the coversheet of your institution and send it along with the document. The cover sheet may include details such as the institution's logo, address, and a brief detail about the document. You can scan the cover sheet created or used by your institution and save it as a TIF image. This TIF file will be included in the executable folder when Ariel is installed.

For sending documents to other Ariel workstations, you must select the required destination. You can use the Select Destinations window to select the address. This window can be accessed by clicking **Select** in the Send window. You can use the Add New Address window to add a new address of an Ariel workstation.

You also create and maintain the list of patrons using the Patron List window. This window can be accessed by clicking **Patron** in the Send window. For more information see "Creating and Maintaining the Patron List".

The window elements in the Send window are described in the following table.

Element	Used to
	Add or modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."

Element	Used to
Transaction...	View the transaction details of a document. For more information see "Selecting Destinations."
Patron...	To select a patron name from the patron list.
Select...	To select the destination address for sending documents to an Ariel workstation.
Add to Address Book	Add a new Ariel workstation address. For more information, see "Creating and Maintaining Address Book".

Field Descriptions

The fields in the Send window are described in the following table.

Field Name	Field Descriptions
Document ID	The title or phrase that identifies a document. This is a mandatory field.
Patron	The name of the patron to whom the scanned document will be sent.
Note	Any remarks or comments about the document.
Cover Sheet	
Include CoverSheet	Select this option to automatically include the coversheet in the scanned document when the document is sent to an Ariel workstation. When this option is selected, the coversheet will be automatically attached to the document and sent to the Ariel workstation.

Field Name	Field Descriptions
Disposition	
Disposition	The modes for sending the document in the Send Queue window. You can select a required mode from the following options: Send and Delete: To send the document to an Ariel workstation and delete it in the Send Queue window. The document will be deleted only if it is received by the intended Ariel workstation. If the Ariel workstation is not accessible when the document is sent, the application will retry sending the document 28 times. Even after that, the document will not be deleted in the Send Queue window. Send and Hold: To send and save a copy of the document in the Send Queue window.
Destination	
To	The alias name or Internet Protocol address or email address of an Ariel workstation. This is a mandatory field. You can also click **Select** to select the aliases name and the Internet Protocol address of an Ariel workstation from the Select Destinations window.

The fields in the Select Destinations window are described in the following table.

Field Name	Field Description
Aliases	The nickname or pseudo name given to an Ariel workstation or an email address of an Ariel workstation which is automatically displayed in the list when this window is accessed.
Address List	The Internet Protocol address of an Ariel workstation which is automatically displayed based on the name selected in the Aliases field.

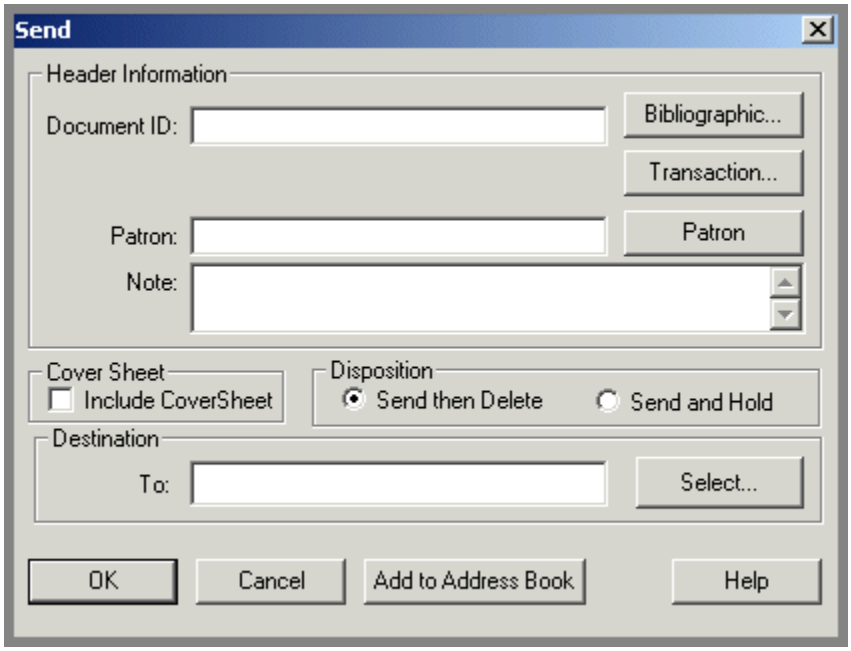
Step by Step

You can send documents to Ariel workstations using the Send window. In addition, you can view the transaction details of documents sent to an Ariel workstation.

Accessing the Send Window

To access the Send window:

Step 1. Select **Document → Send**. The Send window is displayed.



Step 2. Send the documents as required.

1. You can also access the Send window by clicking *in the toolbar.*

*2. The Send window can also be accessed by selecting the **Scan and Send** option in the Disposition field and clicking **End** in the Scan window. You can also access this window by selecting **Send** from the shortcut menu, which will be displayed by right-clicking a document.*

Sending Documents

To send a scanned document:

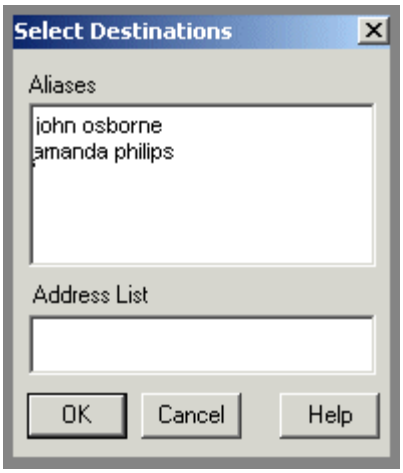
Step 1. Enter the relevant details in the Document ID and Note field.

Step 2. Select the **Include CoverSheet** check box if you want to automatically include the cover sheet when the document is sent.

Step 3. Select the required option from the Disposition field.

Step 4. Enter the Internet Protocol address or the email address of the Ariel workstation in the Destination To field.

Step 5. You can also select the alias name through the Select Destinations window which can be accessed by clicking **Select** in the Send window.



Step 6. Select the required address and click **OK**. The selected address is displayed in the Destination To field. You can also select multiple addresses if required.

Step 7. Click **OK** in the Send window. The document is sent to the respective Ariel workstation and the details of the document are displayed in the Send Queue window.

*1. You can also send documents to patrons from the Send window. Click **Patron** in the Send window. The Patron List window will be displayed. You can select the required patron name and send the document to a patron.*

*2. You can create and maintain the patron list details in the Patron List window. For more information, see "*Creating and Maintaining the Patron List*."*

*3. When you click **Patron** and select the patron name from the patron list, the application will check for the patron's first and last name. If the patron's name exists, the document will be sent and the details will be automatically displayed in the Delivery Queue window.*

4. When you enter the patron's email address in the Patron field, the document will be sent to the patron even though the patron's address is not included in the patron's list. The details of the document will be displayed in the Delivery Queue window.

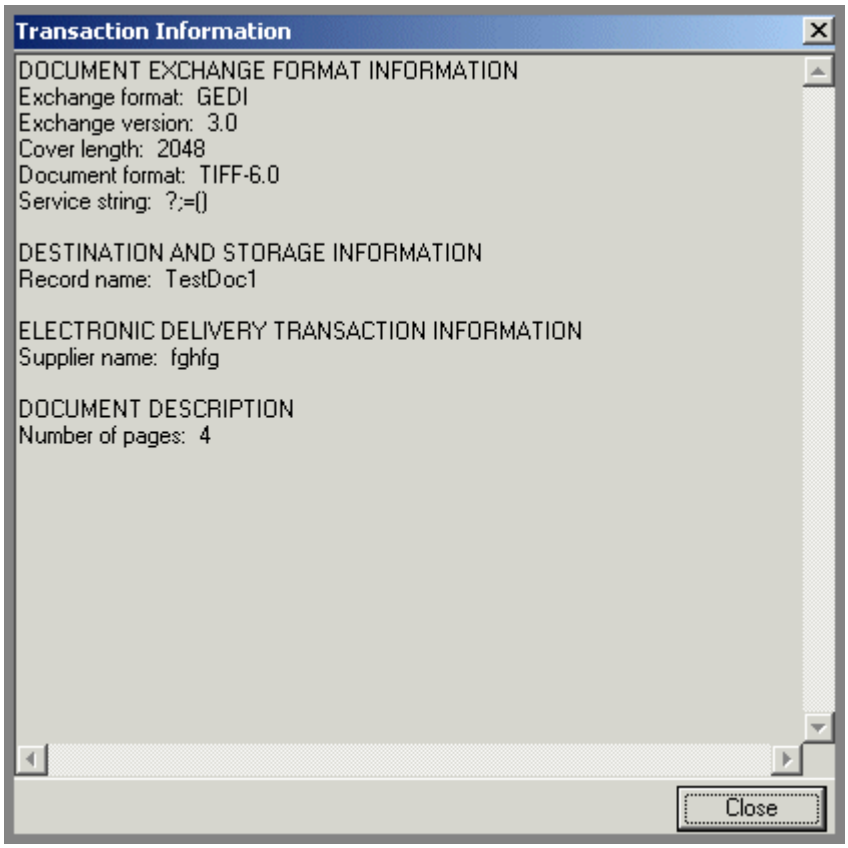
5. You can send .TIF files that are saved in your local drive or folder to an Ariel workstation. You can select the specific file from your local drive and drag and drop it in the Send Queue window. The Send window will be displayed. You can specify the document ID and the address of the Ariel workstation to send the file.

Viewing Transaction Information

To view the transaction details of a specific document:

Step 1. Navigate to the Send window.

Step 2. Click **Transaction**. The transaction details are displayed in the Transaction Information window.



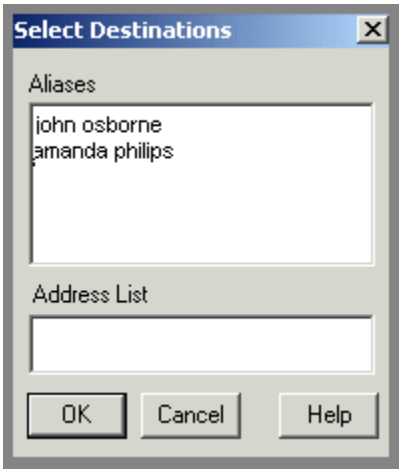
Step 3. Click **Close** to close the Transaction Information window.

You can view the transaction information of documents in the Send and Save windows.

Selecting Destinations

To select the destination for an Ariel workstation:

Step 1. Click **Select** in the Send window. The Select Destinations window is displayed.



Step 2. Select the required alias name. The Internet Protocol address of the selected alias name is displayed in the Address list.

Step 3. Click **OK** to select the address. The Select Destinations window is closed and you are returned to the Send window.

Step 4. You can also click **Cancel** to cancel selection and return to the Send window.

Sending Documents to Patrons

You can send documents to patrons from the Archive, Send, or Received Queue windows. The documents can be sent to patrons through e-mail, or web posting. The details of documents that are sent to patrons are displayed in the Delivery Queue window.

Documents in the Send, Received, Delivery, or Archive Queue windows can be sent to patrons using the Send to Patron window. This window can be accessed by selecting **Send to Patron** in the **Document** menu. From the Send to Patron window, you can also create and maintain patron details using the Add Patron Delivery Information and Update Patron Delivery Information windows respectively. You can modify the bibliographic information of the document and update sent email messages in the Update E-Mail Message window.

For more information on creating, modifying, and deleting the patron details see "Creating and Maintaining the Patron List".

You can search and import an external database consisting of patron address in Ariel. You can use the Select ILL Patron window to import external database of patrons. This window can be accessed by selecting the Search ILL button in the Send to Patron window. You can view the details of patrons and import their addresses to the patron list. Once the patron addresses are imported, you can send documents to them. For more information, see "Creating and Maintaining the Patron List"

The window elements in the Send to Patron window are described in the following table.

Element	Used to
Edit E-mail	Update the email message sent to a patron.
Search ILL	Link the ILL patron database to an Ariel workstation to send documents to patrons. For more information see "Selecting Patrons from the ILL Database."
Send	Send documents to patrons. The documents that are sent to patrons are displayed in the Delivery Queue window.

Element	Used to
Bibliographic...	Add or modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."

Field Descriptions

The fields in the Send to Patron window are described in the following table.

Field Name	Field Description
Categories	Refers to the classification of patrons. You can select a patron category from the drop-down list. The list of patrons' names will be displayed in the patron list based on the patron category selected in this field. The patron categories are set up in the Patron Categories Details window. This is a mandatory field.
Document ID	The title or phrase that identifies a document. This is a mandatory field.
Details	
Name	The name of the patron which is automatically displayed when you select a patron name from the patron list.
E-mail	The email address of the patron which is automatically displayed when you select a patron name from the patron list.

Field Name	Field Description
PIN	The Personal Identification Number (PIN) of the patron, which is automatically displayed when you select a patron from the patron list. The PIN numbers are assigned to patrons for accessing documents on a Web server.
Comment	Any additional remarks about the patron.
Always send document via e-mail	Indicates that the document is sent to the patron only through e-mail. This will be displayed when you select **Always send document via E-mail** check box in the Add Patron Delivery Information window.
Last e-mail notification	The date and time when the last email notification was sent to the patron. This information is automatically displayed when the window is accessed.

Before You Begin

To send documents to patrons, details of email, patron delivery, scan settings, scan options, scan dispositions, send and receive settings, and store forward and store retrieve settings have to be initially set up in the Preferences window. For more information about setting up these details, see "Setting Up Ariel".

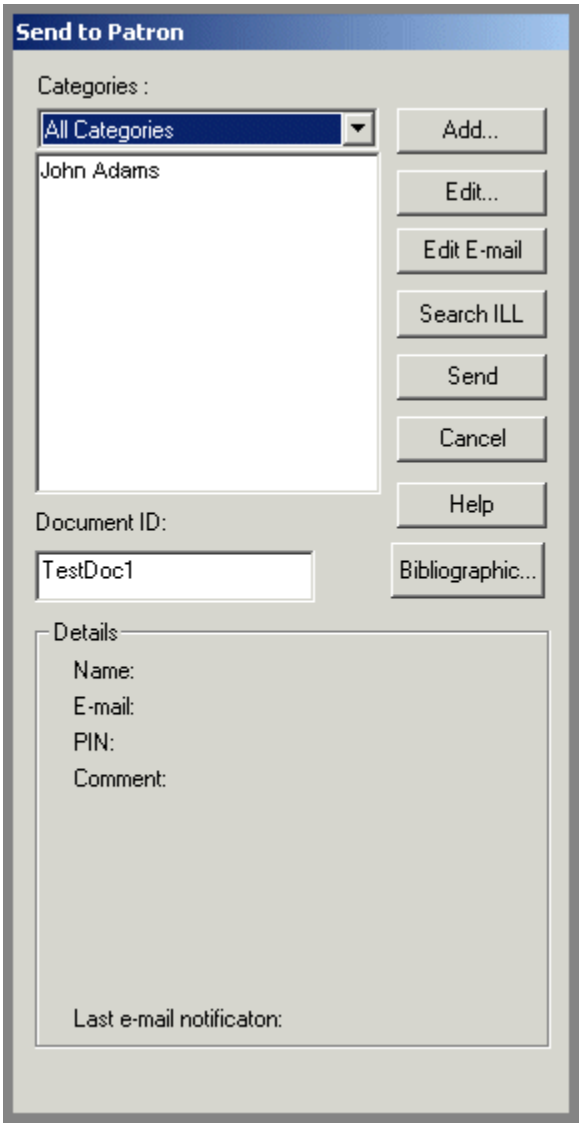
Step by Step

You can send documents to patrons using the Send to Patron window. In addition, you can update email messages using the Updating E-Mail Message window.

Accessing the Send to Patron Window

To access the Send to Patron window:

Step 1. Select **Document → Send to Patron**. The Send to Patron to window is displayed.



Step 2. Send documents to patrons as required.

*You can select a document and right-click and select **Send to Patron** from the shortcut menu to access the Send to Patron window. This window can also be accessed by clicking* *in the toolbar.*

Sending Documents to Patrons

To send a document to a patron:

Step 1. Select the patron category from the categories field. Based on the category selected, the list of patron names is displayed in the list below the Categories field.

Step 2. Select a patron name from the list. The name, email address, personal identification number, and remarks about the patron will be displayed in the Details section. The last date of e-mail notification is also displayed.

Step 3. Enter the document ID.

Step 4. Click **Send**. The Send to Patron window is closed and the document is sent and the details are displayed in the Delivery Queue window.

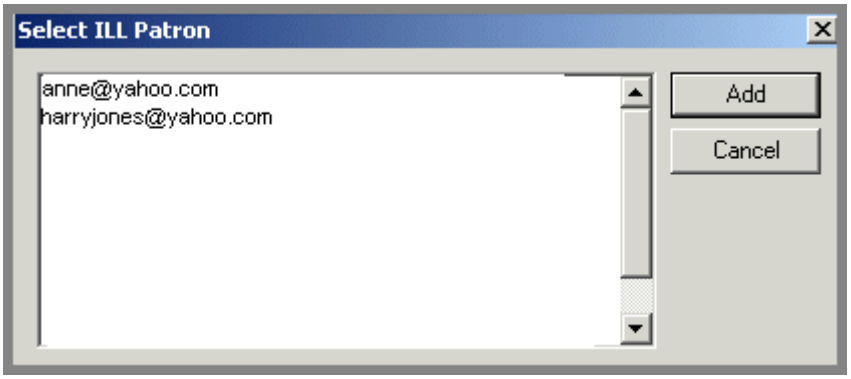
1.You can send .TIF files that are saved in your local drive or folder to a patron. You can select the specific file from your local drive and drag and drop it in the Delivery Queue window. The Send to Patron window will be displayed. You can specify the document ID, and the patron's address to send it to a patron.

2. If there are no patron names for a selected category, Ariel will prompt you to add the patron details before sending a document.

Selecting Patrons from the ILL Database

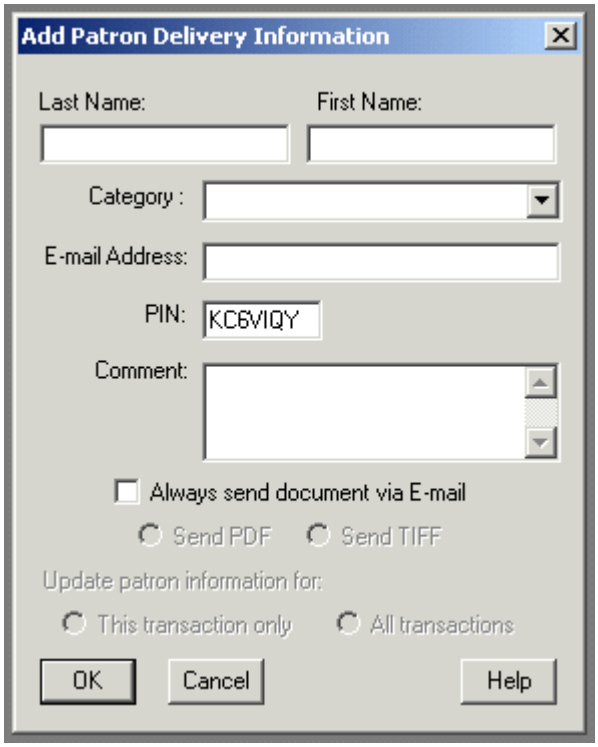
To select patrons from the ILL database:

Step 1. Click **Search ILL** in the Send to Patron window. The Select ILL Patron window is displayed.



Step 2. Select the required patron address from the list.

Step 3. Click **Add**. The Add Patron Delivery Information window is displayed.



Step 4. Select the category from the Category field.

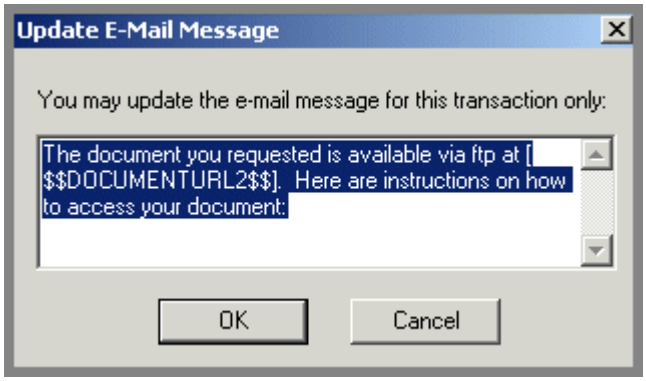
Step 5. Modify the details in the respective fields if required.

Step 6. Click **OK** to save and close the Add Patron Category Information window. The patron's address is added to the list in the Send to Patron window.

Updating E-mail Messages

To update the e-mail message:

Step 1. Click **Edit-Email** in the Send to Patron window. The Update E-mail Message window will be displayed.


Update E-Mail Message
You may update the e-mail message for this transaction only:
The document you requested is available via ftp at [$$DOCUMENTURL2$$]. Here are instructions on how to access your document:
OK
Cancel

Step 2. Update the details as required in the text area.

Step 3. Click **OK** to save the email details and return to the Send to Patron window. You can also click **Cancel** to cancel update and close the Update E-Mail Message window and return to the Send to Patron window.

Modifying Document Details in Send Queue Window

After you send a document to an Ariel workstation, you can add or modify the destination address or the document ID from the Send Queue window. You can add an Ariel workstation address to send documents to more than one Ariel workstation. You can modify the document ID to identify the same documents that are sent to other Ariel workstations. You can modify the details of a document using the Send Queue Entry window. This window can be accessed by selecting a document in the Send Queue window and selecting **Info/Edit** from the **Document** menu. You can also access the Send Queue Entry window by double-clicking a specific document in the Send Queue window.

The window elements in the Send Queue Entry window are described in the following table.

Element	Used to
Bibliographic...	Modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."
Transaction...	View the transaction details of a document. For more information see "Viewing Transaction Information."
Patron...	Select a patron name from the patron list.
Select...	Select the destination address for sending documents to an Ariel workstation.
Add to Address Book	Add a new Ariel workstation address. For more information, see "Creating and Maintaining Address Book".

Field Descriptions

The fields in the Send Queue Entry window are described in the following table.

Field Name	Field Descriptions
Header Information	
Document ID	The title or phrase that identifies a document which is automatically displayed when this window is accessed. You can modify the document ID if required.
Patron	The name of the patron to whom the scanned document will be sent. You can enter the patron name or click **Patron** and select the patron name from the Patron List window.
Note	Any remarks or comments about the document.

Field Name	Field Descriptions
Cover Sheet	
Include Coversheet	Select this option to automatically include coversheet in the scanned document when the document is sent to an Ariel workstation or a patron.
Disposition	
Disposition	The options for sending the document in the Send Queue window. You can select the following options: Send and Delete: Select this option to send the document to an Ariel workstation and delete the copy of the document in the Send Queue window. If the Ariel workstation is not accessible to which the document is sent, the application will retry sending the document 28 times in 24 hours. Even after that time period, if is not received by the Ariel workstation, the document will not be deleted in the Send Queue window. Send and Hold: Select this option to send and save a copy of the document in the Send Queue window.
Destination	
To	The name or Internet Protocol address of an Ariel workstation. You can also click **Select** to select the aliases name and the Internet Protocol address of an Ariel workstation from the Select Destination window. This is a mandatory field.
Other Information	
Status	The current status of the document which is automatically displayed when the window is accessed.

Field Name	Field Descriptions
Pages	The total number of pages in the document. The information is automatically displayed when the window is accessed.
Paper Size	The paper size of the document. This information is automatically displayed when the window is accessed.
When Queued	The date and time when the document is moved into the Send Queue window. This information is automatically displayed when the window is accessed.
Time of Last Try	The time when the application last tried to send the document to the specific destination. This information is automatically displayed when the window is accessed.
Number of Tries	The number of times the application tried resending the document to the specific destination. This information is automatically displayed when the window is accessed. If the document sent is acknowledged by the receiving Ariel workstation, 'Sent' will be displayed in this field.

Step by Step

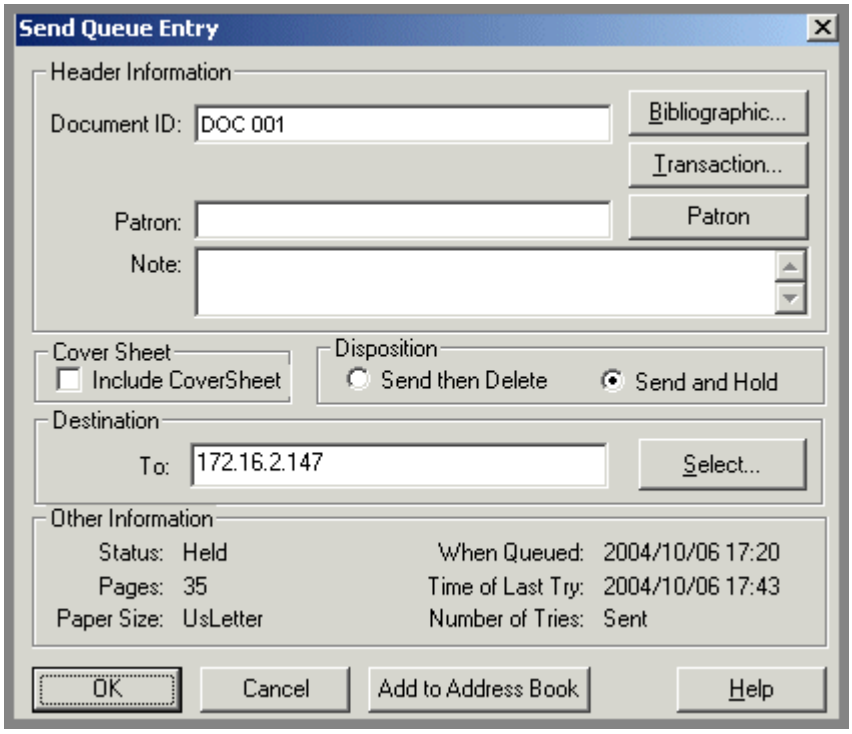
You can modify a destination address or a document ID of a document using the Send Queue Entry window.

Accessing the Send Queue Entry Window

To access the Send Queue Entry window:

Step 1. Select a specific document from the Send Queue window.

Step 2. Select **Document → Info/Edit**. The Send Queue Entry window is displayed with the Document ID and the destination Address.



Step 3. Modify the document details as required.

*You can also access the Send Queue Entry window by selecting **Info/Edit** from the shortcut menu. The shortcut menu will be displayed when you select and right-click a specific document.*

Modifying Sent Documents

To modify the document details:

Step 1. Modify the document ID, or change or add a destination address.

Step 2. Change the disposition settings in the Disposition field if required.

Step 3. Click **OK**. A message is displayed asking you to confirm update.

Step 4. Click **Yes** to update the changes and close the window. You can also click **No** to cancel update and close the Send Queue Entry window.

You can add or modify the bibliographic details of a document by clicking ***Bibliographic*** *in the Send Queue Entry window. For more information, see "*Creating and Maintaining Bibliographic Details*."*

Canceling Documents in Send Queue Window

When the documents are active in the Send Queue window, you can prevent a document to be sent to a destination by canceling the sending process. You can cancel a document when the address specified is invalid or a wrong document is sent to a specific Ariel workstation. You can cancel the sending process only for documents whose status is 'Active'. When the document is active in the Send Queue window, the icon before the Document ID field is highlighted in yellow. Once you cancel sending the document, the status of the document changes to 'Ready' again in the Status field.

You can cancel the sending process by selecting **Cancel Current Send** from the **Document** menu.

Step by Step

You can cancel the sending process for a document in the Send Queue window.

Canceling Sent Documents

To cancel a document

Step 1. Select the specific active document you want to cancel from the Send Queue window.

Step 2. Select **Document → Cancel Current Send**. The application cancels the sending process for the selected document and the status changes to 'Ready' in the Status field.

*1. To cancel a currently sent document, you can also select a document and right-click and select **Cancel Current Send** from the shortcut menu while the document is in the active state.*

*2. You can also cancel sending of documents by turning the Sending option On or Off. You can turn Sending On by selecting the **Sending On** check box in the **Send/Receive** tab of the Preferences window. If this check box is cleared, it indicates that Sending is turned Off and you cannot send documents to the respective destinations.*

*3. You can also turn the Sending option on or off using the **Settings** menu. You can click **Sending** in the **Settings** menu. A tick mark will be displayed before the submenu indicating that Sending is On. When sending is on, documents are sent to the respective destinations. To cancel sending of documents for specific time duration, you can click **Sending** again. The tick mark will disappear and the documents will not be sent to the destination for the specific time duration.*

Managing Documents in Delivery Queue Window

The Delivery Queue window displays the list of documents that are waiting to be sent to patrons. You can use the Delivery Queue window to send documents to patrons or Ariel workstations or save the document in the Archive Queue window. The tasks such as changing document status, viewing, deleting, importing, printing documents, and viewing transfer status of documents are common to all Queue windows and are discussed in "Common Tasks in Document Management." In addition, you can cancel delivery of documents and remove posted documents from the Delivery Queue window. You can also modify the details of documents. The procedural and task related information for performing these tasks are discussed in the following sections:

- Understanding Delivery Queue Window
- Sending Documents in Delivery Queue Window
- Modifying Document Details in Delivery Queue Window
- Canceling Delivered Documents
- Removing Posted Documents

Understanding Delivery Queue Window

Before you can perform various document management tasks, you need to understand how the documents are managed in the Delivery Queue window.

The Delivery Queue window displays the list of documents that are being sent to patrons. The documents that are sent to patrons are displayed in the Delivery Queue window and they are sent via e-mail or FTP. At the receiving end, the patron will receive the document in any POP3 clients such as Outlook Express that is installed in the system.

Documents can be sent to patrons by selecting **Send to Patron** from the **Document** menu. The documents that are sent to patrons can be posted via FTP to a web server. The patron can access and view the document from the web server. A Personal Identification Number (PIN) or a password will be provided for the patrons to access the document on the web server. When the document is acknowledged by the web server and the notification is sent to the patron, the status of the document will be changed to 'Posted'. Documents that are sent via email are sent to the email server.

When the document is received and acknowledged by the email server, the status of the document will be changed to ‘Sent’.

*You can turn the Delivery option on or off using the **Settings** menu. When you select **Delivering** from the **Settings** menu, the delivery process is turned on. A tick mark appears before the submenu. To suspend delivery of documents, you can click this submenu again. The tick mark disappears and the documents will not be delivered to the respective destination.*

Document Status in Delivery Queue Window

The different statuses of a document in the Delivery Queue window are described in the following table:

Status	Description
Ready to Post	Indicates that the document is ready to be posted to the designated web server address.
Posting	Indicates that the document is being posted to the designated server.
Will Retry Post	Indicates that posting is not successful and the application will retry posting the document. The maximum number of times the application will try to post the document will be ten (10.)
Error	Indicates that there was an error while posting the document to the designated server address or patron.
Notifying	Indicates that the document is posted to the designated web server and a notification is being sent to the patron.
Will Retry Notify	Indicates that the notification is not successful and the application will retry notifying the patron. The maximum number of times the application will try notifying the patron will be ten (10.)
Error	Indicates that there was an error while notifying the patron.
Posted	Indicates that the document is now available for the patron on the server.

Status	Description
Removed	Indicates that the document is removed from the designated server where it was posted. The document will be deleted from the server.
Ready to Post/ Held	Indicates that the document whose status is 'Ready to Post' is kept on hold. When a document is kept on hold, the operations that you can perform on a document will be suspended. If the document is released, the status of the document will change to 'Ready to Post.'
Error Posting/ Held	Indicates that the document whose status is 'Will Retry Post' is kept on hold. If the document is released, the status of the document will change to 'Will Retry Post.'
Error Notifying/ Held	Indicates that the document whose status is 'Will Retry Notify' is kept on hold. If the document is released, the status of the document will change to 'Will Retry Notify.'
Posted/Held	Indicates that the document whose status is 'Posted' is kept on hold. In the **Patron Delivery** tab of the Preferences window, if you have specified the duration for posted documents to be removed from the designated web server address, documents whose status is 'Posted", will be removed after specific duration. If these documents are kept on hold, the posted documents will not be removed from the designated server. When the document is released, the status of the document will be 'Posted' again.

Status	Description
Ready to Send	Indicates the document is ready to be sent to the patron's email.
Sending	Indicates that the document is being sent to the patron's e-mail address.
Will Retry Send	Indicates that the document was not successfully sent to the patron and the application will retry sending the document. The maximum number of times the application will try to send the document will be ten (10.)
Error	Indicates that there was an error while sending the document through mail or FTP posting.
Sent	Indicates that the document has been successfully sent to the patron's email.
Error Sending/ Held	Indicates that the document with status 'Error Sending' is kept on hold. If the document is released, the status of the document will change to 'Error Sending.'
Sent/Held	Indicates that the document whose status is 'Sent' is kept on hold. When the document is kept on hold, the documents sent will not be removed from the designated mail server. When the document is released, the status of the document will be 'Sent' again.
Canceled	Indicates that the document's delivery has been canceled.
Canceled/Held	Indicates that the document whose status is 'Cancelled' is kept on hold. If the document is released, the status will change to 'Canceled' again.
Ready to Delete	Indicates that the document is ready to be deleted from the Delivery Queue window.

Status	Description
Deleting	Indicates that the document is being deleted.
Will Retry Delete	Indicates that deletion was not successful and the application will retry deleting the document. The maximum number of times the application will try deleting the document is ten (10.)
Error Deleting	Indicates that there was an error in deleting the document.
Ready to Delete/ Held	Indicates that the document whose status is 'Ready to Delete' is kept on hold.
Error Deleting/ Held	Indicates that the document whose status is 'Error Deleting' is kept on hold. When the document is released, the status of the document will change to 'Will Retry Delete'.

1. When the document is in Sending, Posting, Deleting, Notifying, and Canceling status, it is said to be active and cannot be selected. You can only cancel the delivery of the document by selecting ***Cancel Delivery*** *from the* ***Document*** *menu.*

2. When the document status is Will RetrySend, Will RetryPost, WillRetryNotify, or WillRetry Delete, you can hold the document. The status of the document will then change to ReadytoSend/Held, ReadytoPost/Held, ReadytoNotify/Held, and ReadytoDelete/Held respectively.

Field Descriptions

The fields in the Delivery Queue window are described in the following table.

Field Name	Field Description
Document ID	The title or phrase that identifies a document. The document ID is displayed with the status. The status is displayed in the icon before the field. The Document ID is entered in the Send, Save, and Send to Patron windows.
Status	The current status of the document in the Delivery Queue window.
Date/Time	The date and time when the document first entered the Delivery Queue window. The date will be displayed based on the format you select in the **General** tab of the Preferences window.
Patron	The name of the patron to whom the document is sent.
To	The patron's email address to which the document or notification was sent.
Notes	Remarks about the progress and the final disposition of the document with the time and date.
Pages	The total number of pages of the document.

Field Name	Field Description
Color	The color format used when the document was scanned. This information is displayed when the window is accessed. This is based on the color format set in the Scan window. The available options in the Scan window are B&W, Gray Scale, and Color. If 'C' is displayed, it indicates that some or all the pages of the document contain color and they were scanned using the color format. If 'G' is displayed, it indicates that some or all the pages in the document contain grayscale and they were scanned using the grayscale format. If there is no value displayed in this field, it indicates that all the pages in the document are black and white and the pages were scanned in black and white format.
Paper Size	The paper size of the largest page in the document. The information is automatically displayed when this window is accessed. The paper size for scanning the pages of the document is set up in the **Scan** tab of the Preferences window. For example, if you have scanned the document using the Letter and A3 paper size, 'A3' will be displayed in this field, as this paper size is larger than 'Letter'.
File size	The file size of the document in kilobytes. This information is automatically displayed when the window is accessed.

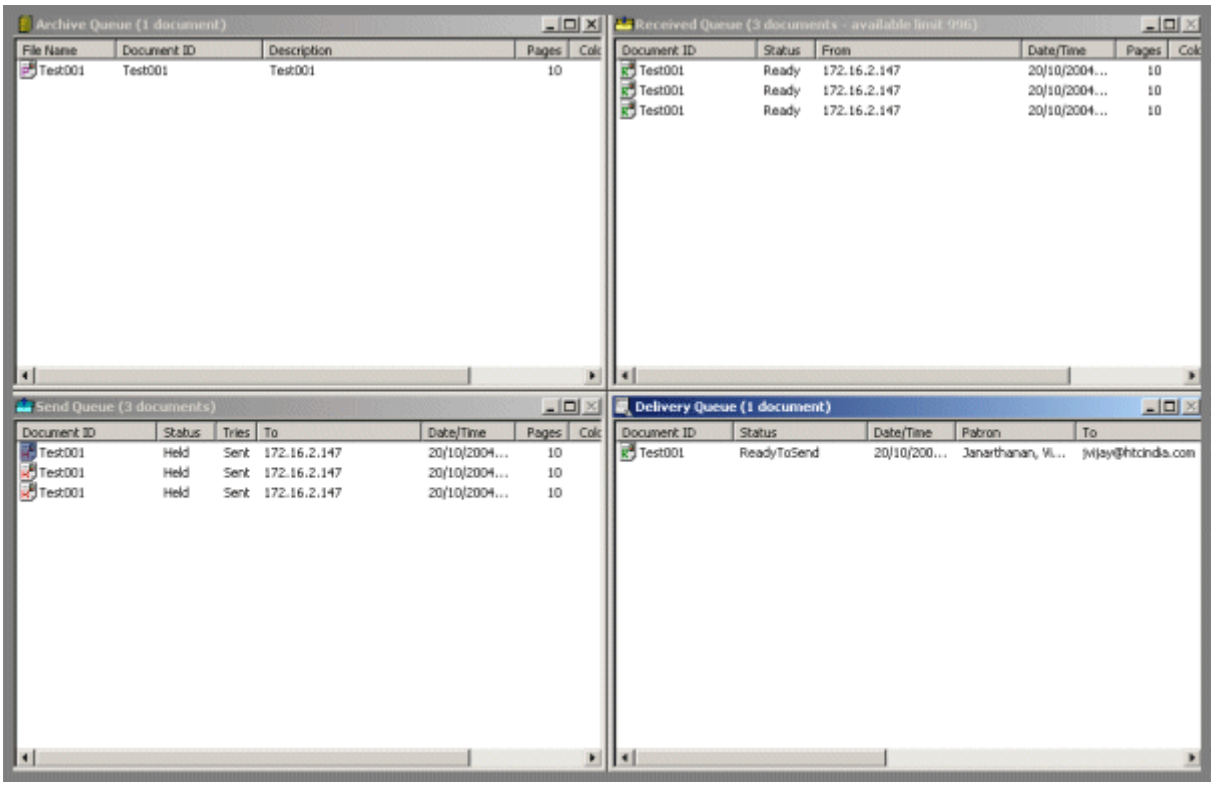
Step by Step

You can access and perform various tasks related to the document delivery using the Delivery Queue window.

Accessing the Delivery Queue Window

To access the Delivery Queue window:

Step 1. Click the Delivery Queue window. The window is enabled.



Step 2. Select the required options and perform the required tasks as needed.

1. You can select a document and right-click it. The shortcut menu will be displayed using which you can perform tasks such as scan, view, save, modify, print, delete, cancel, and import documents and send them to Ariel workstations, patrons, or save them in the Archive Queue window. You can send documents to patrons, cancel currently sent document, hold or release a document, check for new mails or exit the application by selecting the appropriate submenu from the shortcut menu.

*2. The **Cancel Delivery** submenu will be enabled only for active documents.*

Sending Documents in Delivery Queue Window

You can send documents to other Ariel workstations or patrons from the Delivery Queue window. You can specify the Internet Protocol address or the email address of the respective Ariel workstation or patron to send documents. You can resend a document in the Delivery Queue window whose status is ‘Sent’, ‘Removed’, ‘Canceled’, or ‘Error in Send/Post.’

When a document has to be sent to an Ariel workstation, you need to select a specific document from the Delivery Queue window and select **Send** from the **Document** menu. The Send window will be displayed. You can also access the Send window by right-clicking the document and selecting **Send** from the shortcut menu. The shortcut menu will be displayed when you right-click a specific document.

For sending documents to other patrons, you can select **Send to Patron** option from the **Document** menu. The Send to Patron window will be displayed. This window can also be accessed by selecting **Send to Patron**

from the shortcut menu. The shortcut menu will be displayed when you right-click a specific document.

*1. You can also scan and directly send the documents to an Ariel workstation or patron by selecting **Scan and Send** or **Scan and Send to Patron** option in the Scan window.*

2. The field descriptions and the tasks for sending the document to Ariel workstations and patrons are the same as discussed in "Sending Documents to Ariel Workstations" and "Sending Documents to Patrons".

*3. If the document status is 'Posted', you must first select the document and select 'Remove Posted Documents' from the **Document** menu. Once the document status is 'Removed', you can re deliver the document if required.*

4. Until a document is deleted from the Delivery Queue window, you can resend it either via email or FTP.

Modifying Document Details in Delivery Queue Window

You can modify the document ID, email address, or the bibliographic details of a document in the Delivery Queue window. You can also add these details to send documents to other Ariel workstations or patrons. You can use the Patron Delivery Queue Entry window to modify the document details. This window can be accessed by selecting a document in the Delivery Queue window and selecting **Info/Edit** from the **Document** menu. You can also access the Patron Delivery Queue Entry window by double-clicking a specific document in the Delivery Queue window.

The window elements in the Patron Delivery Queue Entry window are described in the following table.

Element	Used to
Bibliographic...	Modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."
Patron...	To select a patron name from the patron list.

Field Descriptions

The fields in the Patron Delivery Queue Entry window are described in the following table.

Field Name	Field Descriptions
Document ID	The title or phrase that identifies a document which is automatically displayed when this window is accessed. You can modify the document ID if required.
Patron	The name of the patron to whom the document will be sent. You can enter the patron name or click **Patron** and select the patron name from the Patron List window.
E-Mail Subject	The subject of the mail sent to the patron.
E-Mail body	The information specified in the email sent to the patron.
Other Information	
Status	The current status of the document which is automatically displayed when the window is accessed.
Pages	The total number of pages in the document. This information is automatically displayed when the window is accessed.
Paper Size	The paper size of the document. This information is automatically displayed when the window is accessed.
Document type	The format in which the document is sent to the patron. For example, the document can be sent to a patron in .PDF format.
When Queued	The date and time when the document is moved into the Delivery Queue window. This information is automatically displayed when the window is accessed.

Field Name	Field Descriptions
Time of Last Try	The time when the application last tried to send the document to the specific destination. This information is automatically displayed when the window is accessed.
Number of Tries	The number of times the application tried resending the document to the specific destination. This information is automatically displayed when the window is accessed. If the document sent is acknowledged by the patron, 'Posted' will be displayed in this field.
Document type	Indicates the type of document. For example, .PDF or .TIF. This information is automatically displayed when the window is accessed.
Message	The current status of the document when it is being sent to the patron or an Ariel workstation. The total number of attempts remaining for the document is also displayed in this field. The status and the number of attempts remaining for the document are automatically displayed when the window is accessed.

Step by Step

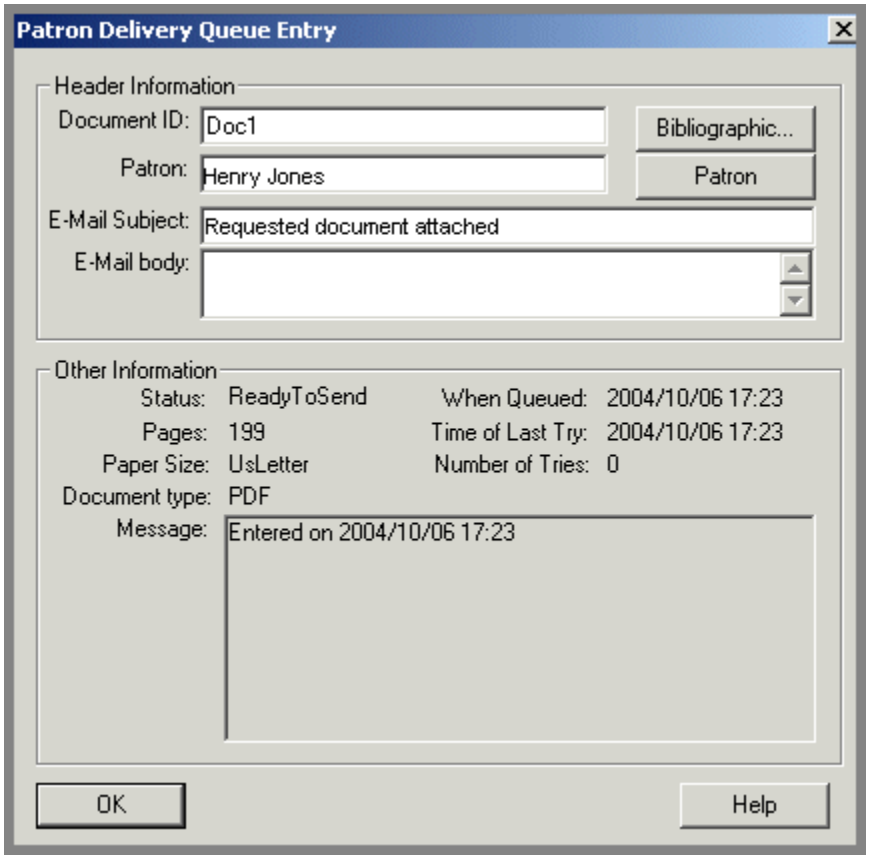
You can modify a destination address, document ID, or the bibliographic details of a document using the Patron Delivery Queue Entry window.

Accessing the Patron Delivery Queue Entry Window

To access the Patron Delivery Queue Entry window:

Step 1. Select a specific document from the Delivery Queue window.

Step 2. Select **Document → Info/Edit**. The Patron Delivery Queue Entry window is displayed with the Document ID and the destination Address.



Step 3. Modify the document details as required.

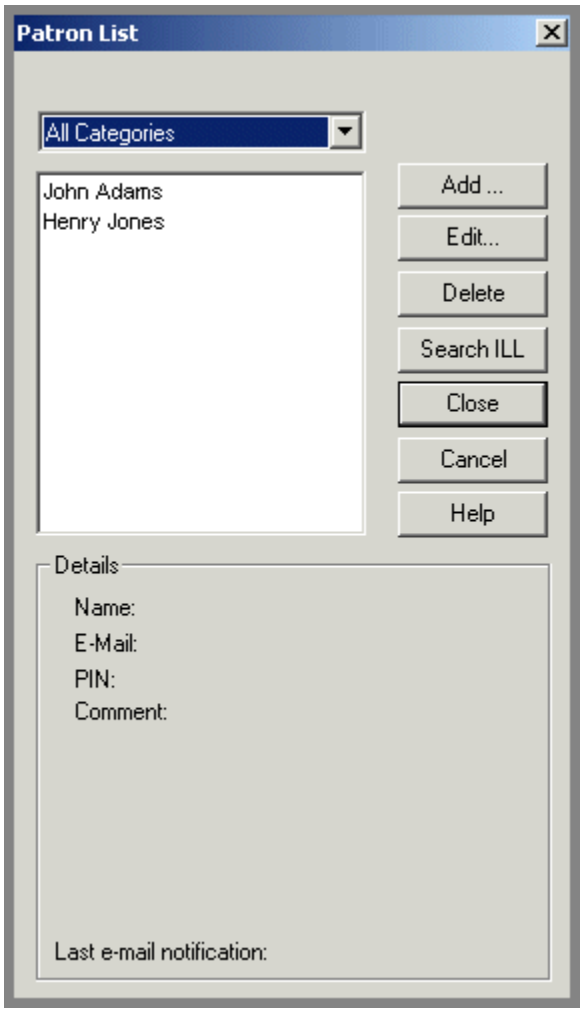
*The Patron Delivery Queue Entry can also be accessed by selecting **Info/Edit** from the shortcut menu. The shortcut menu will be displayed when you select and right-click a specific document.*

Modifying Documents in the Delivery Queue Window

To modify the document details:

Step 1. Modify the document ID subject, and the description of the email if required.

Step 2. Click **Patron** to add or modify the patron address details. The Patron List window is displayed.



Step 3. Add a new patron address or modify the existing patron address.

Step 4. Click **Close** to save and close the Patron List window and return to the Patron Delivery Queue Entry window.

Step 5. Click **OK** in the Patron Delivery Queue Entry window. A message is displayed asking you to confirm update.

Step 6. Click **Yes** to update the changes and close the window.

Step 7. You can also click **No** to cancel the update and close the Patron Delivery Queue Entry window.

Canceling Delivered Documents

You can cancel delivery of documents whose status is active. Documents can be canceled when the address is invalid or when you want the document to be sent later.You can select a specific document and select **Cancel Delivery** from the **Document** menu to cancel the delivery of a document.

Step by Step

You can cancel the delivery of documents in the Delivery Queue window.

Canceling Documents

To cancel a document in the Delivery Queue window:

Step 1. Select the specific active document you want to cancel in the Delivery Queue.

Step 2. Select **Document ➔ Cancel Delivery**. The canceling process begins and the document is not posted or sent to the designated FTP or email server. Once the document is canceled, the status of the document is changed to 'Canceled'.

*1.You can also select a specific active document and select **Cancel Delivery** from the shortcut menu which will be displayed when you right-click a specific document.*

2. When you cancel the delivery of the document, the status of the document will be 'Canceling' and then 'Canceled.'

3. If there is a problem in canceling the document delivery, the document status will change to Canceled/Held and the document will be kept on hold in the Delivery Queue window.

*4. When you click **Retry Delivery**, the status of the document will change to ReadyToSend or ReadyToPost based on the server to which it is sent.*

Removing Posted Documents

You can remove documents from the Delivery Queue window that are posted to the designated server. When the number of documents that can be retained in the Delivery Queue window exceeds the limit, the document will be automatically deleted from the respective Queue window. The documents are deleted based on the number of hours or days specified in the **Patron Delivery** tab of the Preferences window. For more information about patron delivery options, see "Setting Up Patron Delivery Options."

You can select **Remove Posted Documents** from the **Document** menu to remove documents from the Delivery Queue window.

Step by Step

You can remove documents that are posted to the designated server in the Delivery Queue window.

Removing Documents

To remove posted documents:

Step 1. Select the specific document whose status is 'Posted' from the Delivery Queue window.

Step 2. Select **Document → Remove Posted Documents**. The selected document is removed from the Delivery Queue window.

*You can also select **Remove Posted Documents** from the shortcut menu to remove posted documents. The shortcut menu will be displayed when you right-click a specific document.*

Managing Documents in Received Queue Window

The Received Queue window displays the list of documents that have been received from other Ariel workstations. You can save the documents to the Archive Queue window or send the document to a patron or an Ariel workstation. The documents displayed in the Received Queue window are received via FTP. The tasks such as changing document status, viewing, deleting, importing, printing documents, and viewing transfer status of documents are common to all Queue windows and are discussed in "Common Tasks in Document Management." In addition, you can modify the documents details and check for new mails in the Received Queue window. The procedural and task related information for performing these tasks are discussed in the following sections:

- Understanding Received Queue Window
- Modifying Document Details in Received Queue Window
- Checking New Mails

Understanding Received Queue Window

Before you can perform various document management tasks, you need to understand how the documents are managed in the Received Queue window.

The documents that are received from various Ariel workstations are displayed in the Received Queue window. You can print the documents you have received from other Ariel workstations if required. If Auto Printing is On, the document will be automatically printed. Otherwise you can print the document by selecting **Print** from the **Document** menu. The printing options are set in the Preferences window. For more information about setting up printing options see "Setting Up Auto Print Options."

You can print and delete the document, or print and retain a copy of the document in the Received Queue window depending on the received queue dispositions selected in the **Send/Receive** tab of the Preferences window.

*You can turn the Receiving option on or off using the **Settings** menu. When you select **Receiving** from the **Settings** menu, you can receive documents sent by other Ariel workstations. A tick mark appears before the submenu. To suspend receiving of documents for specific time duration, you can click this submenu again. The tick mark disappears, and documents will not be received.*

Document Status in Received Queue Window

The different statuses of a document in the Received Queue window are described in the following table.

Status	Description
Ready	Indicates that the document is ready to be printed when Auto Printing is on.
Active	Indicates that the document is currently being printed. You cannot select an active document. The icon before the Document ID field is highlighted in yellow.
Held	Indicates that the document is waiting in the queue. The document can be printed only after it is released.
Error	Indicates that Auto Printing was On but there was an error and the document could not be printed. If this status is displayed, you need to check your print and auto print settings, which are set up in the Preferences window.

Field Descriptions

The fields in the Received Queue window are described in the following table.

Field Name	Field Description
Document ID	The title or phrase that identifies a document. The document ID is displayed with the status. The status is displayed in the icon before the field. The Document ID is entered in the Send, Save, and Send to Patron windows.
Status	The current status of the document in the Received Queue window.

Field Name	Field Description
From	The Internet Protocol or email address from which the document was sent. Note: Only documents that are sent from Ariel workstations will be displayed in the Received Queue window.
Date/Time	The date and time when the document entered the Received Queue window. The date will be displayed based on the format you select in the **General** tab of the Preferences window.
Pages	The total number of pages of the document received.
Color	The color format used when the document was scanned. This information is displayed when the window is accessed. This is based on the color format set in the Scan window. The available options in the Scan window are B&W, Gray Scale, and Color. If 'C' is displayed, it indicates that some or all the pages of the document contain color and they were scanned using the color format. If 'G' is displayed, it indicates that some or all the pages in the document contain grayscale and they were scanned using the grayscale format. If there is no value displayed in this field, it indicates that all the pages in the document are black and white and the pages were scanned in black and white format.

Field Name	Field Description
Paper Size	The paper size of the largest page in the document. The information is automatically displayed when this window is accessed. The paper size for scanning the pages of the document is set up in the **Scan** tab of the Preferences window. For example, if you have scanned the document using the Letter and A3 paper size, 'A3' will be displayed in this field, as this paper size is larger than 'Letter'.
File size	The file size of the document in kilobytes. This information is automatically displayed when the window is accessed.

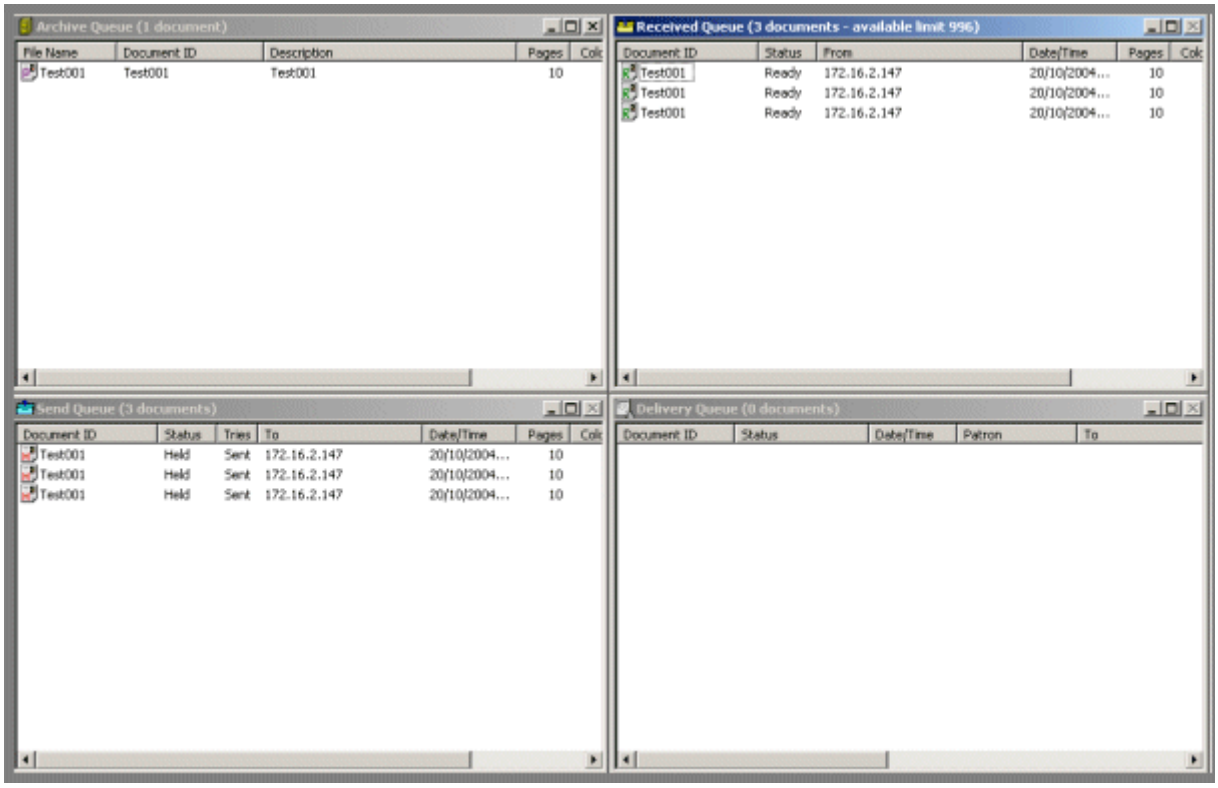
Step by Step

You can access and perform various tasks in the Received Queue window.

Accessing the Received Queue Window

To access the Received Queue window:

Step 1. Click the Received Queue window. The window is enabled.



Step 2. Select the options and perform the required tasks as needed.

1. When you send documents from the Received Queue window to an Ariel workstation or patron, the details of the document will be deleted from the Received queue window and the document details will be displayed in the Send or Delivery Queue window.

2. When a document is saved from the Received Queue window to the Archive Queue window, the application checks the Internet Protocol address with the address book of the current system from where it was sent. If the ***Auto Remove Coversheet*** *check box is selected, the coversheet will be automatically removed from the document when it is saved in the Archive Queue window.*

3. You can select a document and right-click it. The shortcut menu will be displayed using which you can perform tasks such as scan, send, view, save, modify, delete, hold, release, print, and remove coversheet from documents in the Received Queue window. In addition, you can send documents to Ariel workstations and patrons, set up print options, print document, import and save documents and send them to Ariel workstations, patrons, or save them in the Archive Queue window. You can also check for new mails received or exit the application by selecting the appropriate submenu from the shortcut menu.

4. If the received document includes the patron name, the patron name is automatically displayed in the From field. You can modify the patron information before sending the document by selecting ***Info/Edit*** *from the* ***Document*** *menu.*

5. When you receive a document from another Ariel workstation which has sent a document to you and to your patron who exists in a different network, the application will check whether the patron's name exists in your patrons list and the ***Autoforward documents to patrons*** *option is selected in the Mail settings. If both the conditions satisfy, the document will be automatically forwarded to the patron from your system and the details will be displayed in the Delivery Queue window.*

6. You can print a document either before or after sending it to a patron except where the auto print setting is "Print then Delete" in which case, a document in the window will be printed and automatically deleted from the Received Queue window.

Modifying Document Details in Received Queue Window

You can add or change an address for a document ID that is already in the Received Queue window to send a document to a patron. The document ID can be modified to identify the list of documents that are sent to a specific patron. You can use the Received Queue Entry window to add or modify the document details. This window can be accessed by selecting a document in the Received Queue window and selecting **Info/Edit** from the **Document** menu. You can also access the Received Queue Entry window by double-clicking a specific document in the Received Queue window.

The window elements in the Received Queue Entry window are described in the following table.

Element	Used to
	Modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."
	View the transaction details of a document. For more information see "Viewing Transaction Information."
	To select a patron name from the patron list.

Field Descriptions

The fields in the Received Queue Entry window are described in the following table.

Field Name	Field Descriptions
Header Information	
Document ID	The title or phrase that identifies a document which is automatically displayed when this window is accessed. You can modify the document ID if required.

Field Name	Field Descriptions
Patron	The name of the patron. You can enter the patron name or click **Patron** and select the patron name from the Patron List window.
Note	Any remarks or comments about the document.
Auto Printing Settings	The different modes specified for printing the document in the Received Queue window. You can select a required option. The available options are: Print then Delete: Select this option to print the document and delete it in the Received Queue window. Print and Hold: Select this option to print and retain a copy of the document in the Received Queue window.
Other Information	
Status	The current status of the document, which is automatically displayed when the window is accessed.
Pages	The total number of pages in the document. This information is automatically displayed when the window is accessed.
Paper Size	The paper size of the document. This information is automatically displayed when the window is accessed.
From	The Internet Protocol address from where the document was received.
Queued	The date and time when the document moved into the Received Queue window. This information is automatically displayed when the window is accessed.
Auto Printed	The total number of pages printed.

Step by Step

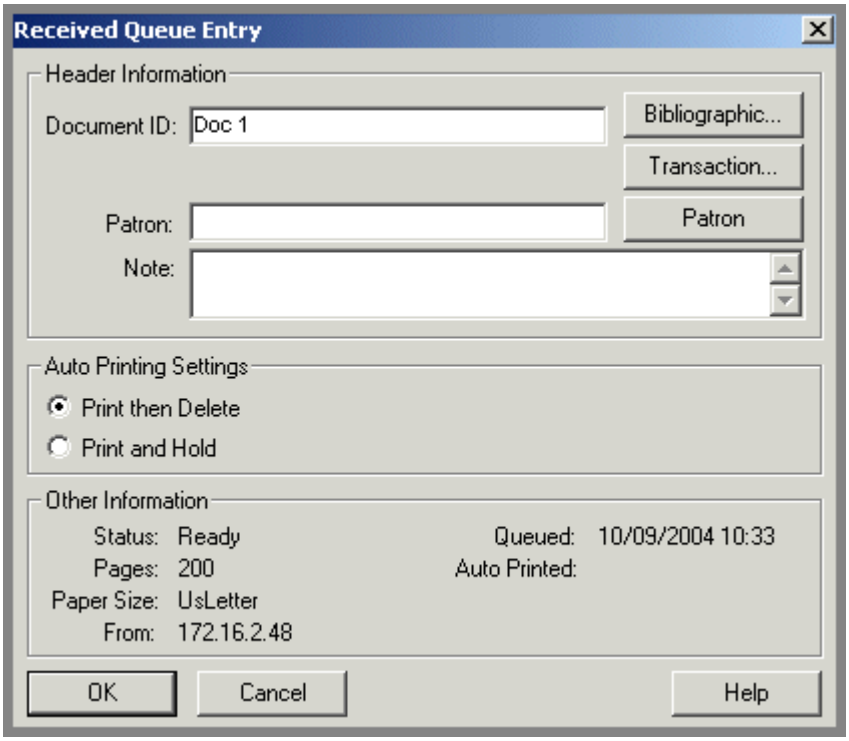
You can modify the destination address of a document, or document ID using the Received Queue Entry window.

Accessing the Received Queue Entry Window

To access the Received Queue Entry window:

Step 1. Select a specific document from the Received Queue window.

Step 2. Select **Document → Info/Edit**. The Received Queue Entry window is displayed with the Document ID.



Step 3. Modify the document details as required.

*The Received Queue Entry window can also be accessed by selecting a document and right-clicking **Info/Edit** from the shortcut menu. The shortcut menu will be displayed when you select and right-click a specific document.*

Modifying Received Documents

To modify the document details:

Step 1. Modify the document ID, or change or add a destination address.

Step 2. Change the auto print settings if required.

Step 3. Click **OK**. A message is displayed asking you to confirm update.

Step 4. Click **Yes** to update the changes and close the window.

Step 5. You can also click **No** to cancel update and close the Received Queue Entry window.

Checking New Mails

You can check for new mails that you have received from an Ariel workstation. The new mails are retrieved from the Store and Retrieve server. The Internet Protocol address of the server which will act as a store and Retrieve server is set up in the **Store & Forward / Store & Retrieve** tab of the Preferences window. For more information about the store and retrieve options, see "Setting Up Store Forward and Store Retrieve Options".

The time duration for retrieving new mails can be set up in the **Store & Forward / Store & Retrieve** tab of the Preferences window. If you want to check for new mails within this time duration specified, you can use select **Check for New Mails Now** from the **Document** menu.

Step by Step

You can check for new mails in the Received Queue window.

Checking Mails

To check for mails you have received:

Step 1. Select the Received Queue window.

Step 2. Select **Document → Check for New Mails Now**. If you have received a new mail from an Ariel workstation, the details of the document will be displayed in the Received Queue window.

1. Specify the Internet Protocol address for the Store and Retrieve server to receive mails from the Ariel workstations.

*2. You can also right-click a specific document and select **Check for New Mails Now** from the shortcut menu. The shortcut menu will be displayed when you right-click a specific document.*

3. You can also click *in the toolbar to check for new mails.*

Managing Documents in Archive Queue Window

The Archive Queue window displays the list of documents that have been saved directly after scanning or from the Received, Send, and Delivery Queue windows. Through the Archive Queue window, you can send documents to a patron or an Ariel workstation. You can open the Archive Queue window if it closed in the application. The tasks such as sending, saving, viewing, deleting, importing, and printing documents are common to all the Queue windows, and are discussed in "Common Tasks in Document Management." You can also modify the document details or bibliographic information using the Archive Queue window. The procedural and task related information for performing these tasks are discussed in the following sections:

- Understanding Archive Queue Window
- Opening Archive Queue Window
- Modifying Document Details in Archive Queue Window

Understanding Archive Queue Window

Before you can perform various document management tasks, you need to understand how the documents are managed in the Archive Queue window.

The Archive Queue window lists the documents that are saved after scanning or saved from the Send, Received, and Delivery Queue windows. You can send copies of the same document to different Ariel workstations or patrons whenever they request documents if the documents are saved in the Archive Queue windows. Ariel automatically assigns the extension .ARV for archive documents.

You can send the documents to Ariel workstations or patrons and view or print documents in the Archive Queue window.

Field Descriptions

The fields in the Archive Queue window are described in the following table.

Field Name	Field Description
File Name	The name of the file in which the document is saved. This information is automatically displayed when the window is accessed.
Document ID	The title or phrase that identifies a document. This information is automatically displayed when the window is accessed. The Document ID is entered in the Send, Save, and Send to Patron windows.
Description	Any specific description of the file saved. This information is automatically displayed when the window is accessed.
Pages	The total number of pages of the document which is automatically displayed when the window is accessed.

Field Name	Field Description
Color	The color format used when the document was scanned. This information is displayed when the window is accessed. This is based on the color format set in the Scan window. The available options in the Scan window are B&W, Gray Scale, and Color. If 'C' is displayed, it indicates that some or all the pages of the document contain color and they were scanned using the color format. If 'G' is displayed, it indicates that some or all the pages in the document contain grayscale and they were scanned using the grayscale format. If there is no value displayed in this field, it indicates that all the pages in the document are black and white and the pages were scanned in black and white format.
Paper Size	The paper size of the largest page in the document. This information is displayed when this window is accessed. The paper size for scanning the pages of the document is set up in the **Scan** tab of the Preferences window. For example, if you have scanned the document using the Letter and A3 paper size, 'A3' will be displayed in this field, as this paper size is larger than 'Letter'.
File size	The file size of the document in kilobytes. This information is automatically displayed when the window is accessed.

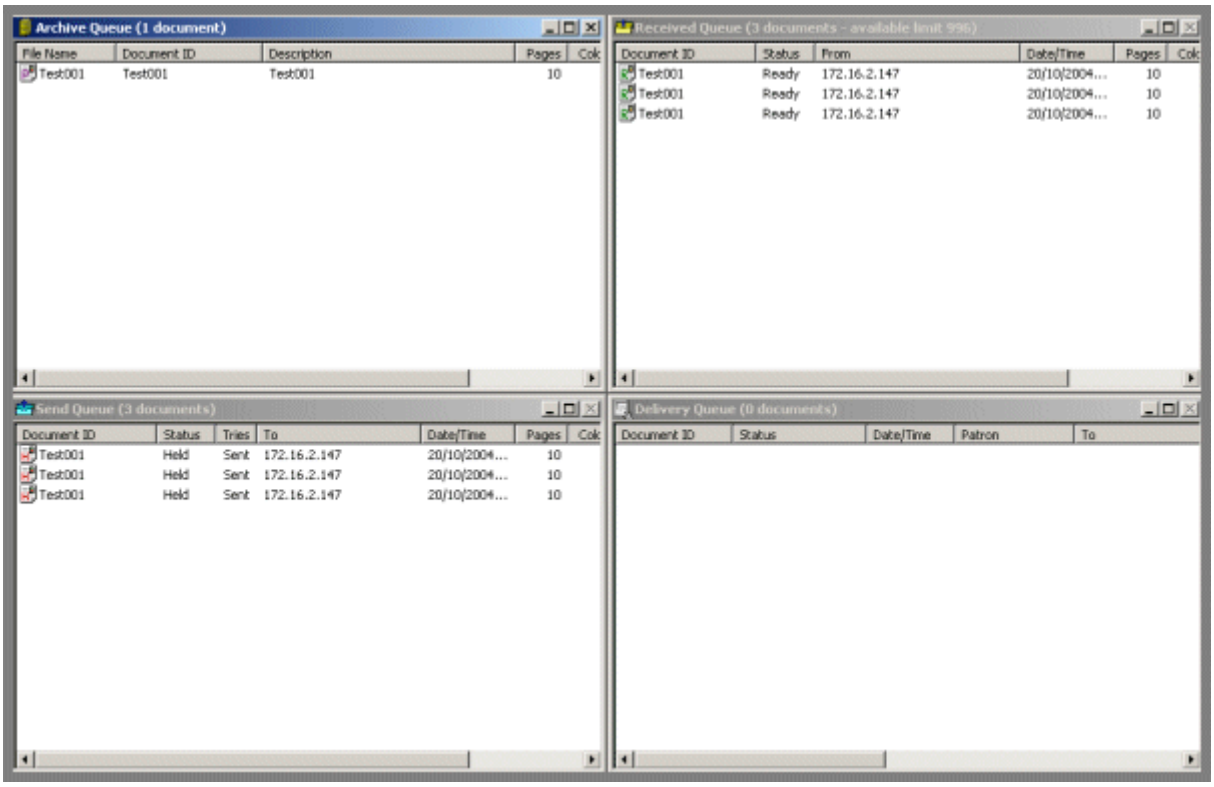
Step by Step

You can access and perform various tasks in the Archive Queue window.

Accessing the Archive Queue Window

To access the Archive Queue window:

Step 1. Click the Archive Queue window. The window is enabled.



Step 2. Save the documents as needed.

1. You can select a document and right-click it. The shortcut menu will be displayed using which you can perform tasks such as scan, send, view, modify, delete, print, import documents to Ariel workstations and patrons, or save them. In addition, you can send documents to patrons, set up print options, print documents, and check for new mails by selecting the appropriate submenu from the shortcut menu.

2. You can save .tif, .jpeg, .pdf, or .bmp files in your local drive or folder to the Archive Queue window. You can select a specific document from your local drive or folder and drag and drop the file in the Archive Queue window. The file is saved and the document details are displayed in the Archive Queue window.

Opening Archive Queue Window

You can open the Archive Queue window from the Send, Received, or Delivery Queue windows if you have closed the Archive Queue window in Ariel. If the Archive Queue window is closed, the window will not be displayed when you access Ariel. You can select **Open Archive** from the **Document** menu to open the Archive Queue window.

Step by Step

You can open an Archive Queue window from the Send, Received, or Delivery Queue windows.

Opening Archive Queue Window

To open an Archive Queue window:

Step 1. Select the Send, Received, or Delivery Queue window.

Step 2. Select **Document → Open Archive** or right click on any empty window and click **Open Archive** in the submenu. The Archive Queue window is displayed.

1. You can also click *in the toolbar to open the Archive Queue window.*

*2. The Archive Queue window can also be accessed by clicking **Open Archive** from the shortcut menu which will be displayed when you select a specific document and right-click it in the Send, Received, and Delivery Queue windows.*

Modifying Document Details in Archive Queue Window

You can modify the file name, document ID, and the file description of a document in the Archive Queue window. These details can be modified to track and identify documents that are saved from the Send, Delivery, and Received Queue windows. In addition, you can send the modified documents to other Ariel workstations or patron when they request for documents. You can use the Archive Entry window to modify the document details. This window can be accessed by selecting a document in the Archive Queue window and selecting **Info/Edit** from the **Document** menu. You can also access the Archive Entry window by double-clicking a specific document in the Archive Queue window.

The window elements in the Archive Entry window are described in the following table.

Element	Used to
Bibliographic...	Modify the bibliographic details of a document. For more information see "Creating and Maintaining Bibliographic Details."
Transaction...	View the transaction details of a document. For more information see "Viewing Transaction Information."
Patron...	To select a patron name from the patron list.

Field Descriptions

The fields in the Archive Entry window are described in the following table.

Field Name	Field Descriptions
Document ID	The title or phrase that identifies a document which is automatically displayed when this window is accessed. You can modify the document ID if required.
Patron	The name of the patron. You can enter the patron name or click **Patron** and select the patron name from the Patron List window.
Note	Any remarks or comments about the document.

Field Name	Field Descriptions
Archive Entry Identification	
File Name	A unique file name given to the document when the document is saved in the Archive Queue window. This is a mandatory field. 1. File name can be more than 8 characters. The file name cannot use characters that are invalid for DOS file names. 2. Ariel automatically assigns the extension .ARV for archive files.
Description	The description given to a file name when you save a document.
Other Information	
Pages	The total number of pages in a document. This information is automatically displayed when the window is accessed.
Paper Size	The paper size of the document. This information is automatically displayed when the window is accessed.
When Archived	The date and time when the document moved to the Archived Queue window. This information is automatically displayed when the window is accessed.

Step by Step

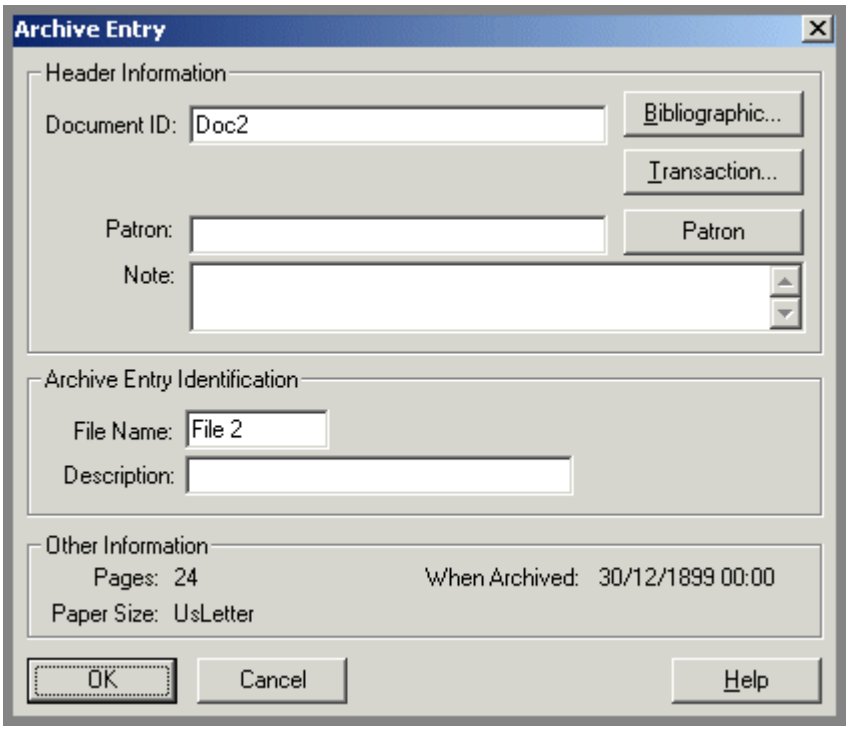
You can modify the file name, description, or the document ID of a document using the Archive Entry window.

Accessing the Archive Entry Window

To access the Archive Entry window:

Step 1. Select a specific document from the Archive Queue window.

Step 2. Select **Document → Info/Edit**. The Archive Entry window is displayed with the file name.



Step 3. Modify the details as required.

*The Archive Entry window can also be accessed by selecting a document and right-clicking **Info/Edit** from the shortcut menu. The shortcut menu will be displayed when you select and right-click a specific document.*

Modifying Archive Documents

To modify the details in the archive document:

Step 1. Modify the document ID, or change the file name and description if required in the Archive Entry window.

Step 2. Click **OK**. A message is displayed asking you to confirm update.

Step 3. Click **Yes** to update the changes and close the Archive Entry window.

Step 4. You can also click **No** to cancel update and close the Archive Entry window.

Glossary

C

Client - An Ariel workstation that can only scan, print, and save documents.

D

Dither - A technique used in computer graphics to create additional colors and shades from an existing palette by interspersing pixels of different colors.

F

Firewall - A security system to protect an organization's network against external threats.

G

GEDI - Refers to a Group of Electronic Document Interchange. It is a type of document whose header consists of fields stored at the beginning of an Ariel document. It can also contain bibliographic and transaction information.

I

ILL - Acronym for Inter Loan Library. It is a service that allows users to borrow materials from other libraries without having to travel to them. It is a mechanism for different libraries to share materials.

IMAP - Internet Message Access Protocol. A method for an email program to gain access to email and bulletin-board messages stored on a mail server. Unlike POP3, IMAP allows a user to retrieve messages efficiently from more than one computer.

IP Address - Internet Protocol address. It is a binary number that uniquely identifies a computer connected to the Internet for the purpose of communication through the transfer data broken up into packets.

ISBN - Acronym for International Standard Book Number. A unique ten digit number assigned for a book.

ISDN - Integrated Services Digital Network. It is an international communications

standard for sending voice, video, and data over digital telephone lines or normal telephone wires. ISDN supports data transfer rates of 64 kbps (64000 bits per second).

ISSN - Acronym for International Standard Serial Number. It is a unique number assigned to a book or document to identify publications including monographic series. In 1979, the ISSN replaced the ISBN for serials.

L

LAN - Local Area Network. A group of computers and other devices dispersed over a relatively limited area and connected by a communication link that enables any device to interact with any other on the network.

M

MSDE 2000 - Microsoft SQL Server 2000 Desktop Engine is a data engine built and based on core SQL Server technology. It is a reliable storage engine and query processor for desktop extensions of enterprise applications.

N

NAT - Net Address Translation. The process of converting between IP addresses used within an intranet or other private network (called a stub domain) and Internet IP addresses.

P

POP3 - Post Office Protocol. It is a protocol for servers on the Internet that receive, store, and transmit emails and for clients on computers that connect to the servers to download and upload e-mail.

Proxy Server - A firewall component that manages Internet traffic to and from a LAN and can provide other features, such as document caching and access control.

R

Registry - Registry is a central hierarchical database used to store information necessary to configure the system for one or more users, applications, and hardware devices.

Resolution - Is the fineness of details attained when images or documents are scanned. Resolution is measured in dots per inch or dpi or pixels for video display.

U

URL - Uniform Resource Locator. It specifies the protocol to be used in accessing

a resource on the Internet (http for a www page or ftp for a FTP site), name of the server where the resource resides (//www.whitehouse.gov), and the path to a resource.

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